

ORIGINAL RESEARCH ARTICLE

To Be and Not to Be: The Middle Management Paradox and Resistance Escalation Process During Transitions to Self-Managing Organizations

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Abstract

Self-managing organizations (SMO) constitute a radical attempt to avoid hierarchical control and manager–subordinate authority relationships by suppressing them outright. For existing organizations, transiting to SMO poses significant challenges, especially for middle managers who became ‘architects of their own demise’. Combining 38 interviews, direct observation over 4 years, and secondary data we show in this paper that SMO transitions expose middle managers to a paradoxical situation that led them to engage in an escalation process of resistance that culminated in the subversion of the SMO experiment. These results contribute to SMO studies by documenting transition difficulties and the middle management paradox. Our study enriches knowledge on middle managers resistance in post-bureaucratic organizational forms by documenting the boundary conditions that allow the transition from individual to collective hidden and then collective, overt, and transformative forms of managerial resistance.

Keywords: *Post-bureaucracy; Self-managing organizations; Organizational transition; Middle managers; Resistance*

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Can organizations be designed without hierarchical control and manager–subordinate relationships? This question has sparked numerous debates and experiments among practitioners and scholars who seek to overcome the drawbacks of hierarchy and managerial control. These dominant organizing principles are accused of contributing to dehumanization while marginalizing individual experience and initiative (Spicer, 2011), being less effective and rational than they claim to be, and limiting the agility of contemporary organizations to meet the demands of increasingly turbulent and uncertain environments (Child, 2019). Building on an older legacy of total quality management, lean management, and project management (see Monteiro & Adler, 2022 for an overview), a new generation of experiments has emerged. These go by various names, from ‘holacracy’ (Bernstein et al., 2016) and ‘liberated company’ (Carney & Getz, 2009; Getz, 2011) to neo-participative management (Daudigeos et al., 2021) and the more exotic ‘new age management’ (Islam & Sferrazzo, 2022) – even ‘spaghetti organization’ (Foss & Klein, 2022).

Based on the pioneering work of Barker (1993), Lee and Edmondson (2017) have grouped these labels under the category of self-managing organizations (henceforth SMO), defined as organizations ‘that formally and radically decentralize authority throughout an organization, thereby eliminating the manager-subordinate authority relationship’ (Lee & Edmondson, 2017, p. 50).

Despite the diversity of these contemporary experiments and idealistic language (Foss & Klein, 2022), scholarship around transitions from hierarchy and managerial control to SMO has been fragmented and scarce (Ketkar & Workiewicz, 2022; Lee & Edmondson, 2017; Poli & Gabriel, 2024). Such transitions involve deep organizational transformations and, as Burton et al. (2017) note, early enthusiasm is belied in practice by the frequent reversion and degeneration of initial SMO goals. Recent studies have shed light on the tensions inherent in the SMO transition process (see Lee, 2024 for an overview) and identified, in particular, difficulties at the middle management level (Foster et al., 2019; Lee & Edmondson, 2017).

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During SMO transitions, middle managers are faced with a paradoxical situation (Luscher et al., 2006). They are key change agents (Letierce et al., 2023; Tarakci et al., 2023) and serve as 'linking pins' (Floyd & Wooldridge, 2017) for reshuffling the control regime imposed by top management. In practice, this involves dismantling their status, authority, and professional identity (Foster et al., 2019). For middle managers, SMO transitions mean they are not only the strategic agents, but also the main targets of change (Maurer et al., 2024); as Foster et al. have formulated it, they are the 'knowing architects of their own demise' (Foster et al., 2019, p. 482). Scholars have only started to identify the paradoxical situation middle managers face during SMO transitions, but they have not documented it empirically. This lack of knowledge is even more problematic because middle managers confronted with post-bureaucratic and neoliberal contexts (Daudigeos & Valiorgue, 2011) may engage in transformative resisting activities capable of altering executives' decisions, objectives, and strategic plans (see Courpasson et al., 2017 for an overview). The fragility of SMO transitions and preliminary evidence of the paradoxical role and resisting potential of middle managers point to the need to better understand the reactions of middle managers to SMO transitions. Therefore, we ask: *How do middle managers respond to the disappearance of manager-subordinate authority relationships and the transformation of control during transitions to SMO?*

To address this question, we build on insights from prior studies on SMO transition difficulties (e.g., Daudigeos et al., 2021; Poli & Gabriel, 2024; van Baarle et al., 2021) and the role of middle managers as not only strategic organizational change agents (cf., Tarakci et al., 2023) but also potential active resisters (cf., Courpasson et al., 2021). Based on a qualitative and longitudinal case study of Yops,¹ a SMO that experienced an unexpected transition failure during the research process, we focus on how the middle managers contributed to the transformation of organizational control and elimination of the manager-subordinate authority relationships but were subsequently plunged into a paradoxical situation. We document how, in response, they initiated an escalation process of resistance (Fleming & Spicer, 2007) which ultimately led to the termination of the SMO experiment. Combining 38 interviews with direct observations over 4 years and secondary data, we examined the practical and cognitive facets of the middle management paradox that characterizes SMO transitions and how it generates a defensive response constituted of three interrelated forms of resistance: individual hidden, collective hidden, and collective overt.

Our study offers three insights that have implications for the analysis of SMO transition failures by (1) documenting the paradoxical situation middle managers experience, (2) explaining

how this middle management paradox constitutes a key but overlooked concern, and (3) offering insights into the connections between the paradox middle managers face and the various forms of resistance they implement to derail SMO transitions.

Middle managers as the victims, change agents, or gravediggers of SMO transitions?

SMO constitute a radical attempt to avoid the drawbacks of hierarchical control and manager-subordinate authority relationships by suppressing them outright (Barker, 1993; Lee & Edmondson, 2017; Maurer et al., 2024). This rejection does not mean there is no organizational control – defined by Kärreman and Alvesson (2004) as an apparatus for specifying, monitoring, and evaluating individual and collective action (Kärreman & Alvesson, 2004, p. 152). Barker's (1993) pioneering work on SMO noted a persistence of managerial activities and more specifically, organizational control, along with a change in its modalities, toward 'concertive control' and worker-driven coordination planning, work division, and discipline. As noted by Lee and Edmondson, organizational control remains vital in SMO; however, the associated activities are 'formally distributed to individuals and workers teams in a way that is not permanent, unbounded, or vested in hierarchical rank' (Lee & Edmondson, 2017, p. 46).

SMO transitions and their pitfalls

For existing organizations, abandoning hierarchical control during a SMO transition poses significant challenges (Lee, 2024; Poli & Gabriel, 2024). Barker (1993) emphasized the complexity of SMO transitions – they can take many years and involve deep learning of new routines and practices to enforce new control norms and rules collectively defined, operationalized, and maintained by workers. By examining the transition toward a 'liberated company', Picard and Islam (2020) shed light on the vacuum created by removing hierarchical control and managerial authority relationships, leading to the disorientation of workers 'faced with the floating roles and expectations of an increasingly absent leader and weakened organizational order' (p. 27). Similarly, Daudigeos et al. have shown how SMO transitions fuel internal criticism and worker dissatisfaction, which are then diverted and disarmed by subtle political processes of domination (Daudigeos et al., 2021).

Such studies illustrate the difficulties encountered by executives who want to operationalize a transition into a SMO (Bourlier Bargues et al., 2021; Poli & Gabriel, 2024). Presented by management gurus as a progressive solution (Foss & Klein, 2022), SMO transitions nevertheless pose extensive organizational and managerial challenges

¹ All names of individuals and organizations are pseudonyms.

(Battistelli et al., 2023; Foster et al., 2019). Early enthusiasm can degenerate quickly and culminate in the transition process being abandoned (Burton et al., 2017; Lee & Edmondson, 2017; Schell & Bischof, 2022).

Although the threat of SMO transition failure has been established, its causes and mechanisms remain uncertain, as few researchers have documented its origins, processes, and dynamics (Lee, 2024; Poli & Gabriel, 2024). Recent research has suggested, however, that a key to understanding SMO transition failure is the ongoing tensions and resistance among SMO members (Picard & Islam, 2020; Schell & Bischof, 2022; van Baarle et al., 2021) and more specifically, the difficulties arising at the middle management level (Lee & Edmondson, 2017; Livijn, 2019; Schell & Bischof, 2022).

The middle management paradox

Middle managers are located in the organizational hierarchy between executives and front line managers (Floyd & Wooldridge, 2017) and mediate strategic objectives, information flows, and operational issues between them (Azambuja & Islam, 2019; Tarakci et al., 2023). Situated at the boundary of the organization, they maintain direct relationships with external stakeholders (Azambuja et al., 2023; Oldenhof et al., 2016; Valiorgue, 2016) and ensure that internal and external actors agree on what the organization is and does (Floyd & Wooldridge, 2017; Oldenhof et al., 2016; Porck & van Knippenberg, 2023; Valiorgue, 2009). From this specific organizational position at the crossroads of internal and external influence, middle managers act as essential organizational change agents (Letierce et al., 2023).

In a SMO transition context, middle managers, as strategic change agents, play a key role in enforcing executives' organizational choices and are directly involved in the enforcement of a new regime of organizational control. At the same time, succeeding in this mission means erasing an essential part of their organizational role as managerial activities and control would thereafter be performed by the empowered, skilled, and autonomous workers (Lee, 2024). Middle managers therefore enter SMO transitions as 'knowing architects of their own demise' (Foster et al., 2019, p. 482). That is, they serve not only as the implementers but also the targets of change (Maurer et al., 2024).

Participating, leaving, or resisting?

Despite the strategic importance and paradoxical role that middle managers play in SMO transitions, little is known about how they maintain a job position while working toward 'their own demise' by transferring their prerogatives and empowering workers (Livijn, 2019). As change agents, is it possible for middle managers to stay loyal to executives while undermining

their own existence? Or can they resist by blocking and/or redirecting the transition process? Middle managers' active participation (or resistance) may shed light on the difficulties and chances of success in SMO transitions.

Although middle managers' reactions have not been directly documented, research on the 'dark side' of SMO by Daudigeos et al. (2021) has suggested that some middle managers react to the tensions and difficulties they encounter by leaving the organization. Such forms of individualized and covert resistance (Mumby et al., 2017) were also found by Maurer et al. (2024), who showed how middle managers who remain can resist individually and secretly. This emergent literature suggests that middle managers can resist SMO transitions and confirms other findings on managerial resistance in post-bureaucratic and neoliberal contexts (Courpasson et al., 2012, 2017). However, these individual and hidden forms of resistance constitute 'infra-politics' (Scott, 1990), 'safety valves' (Fleming & Sewell, 2002), and 'decaf resistance' (Contu, 2008) and do not lead to questioning the objectives pursued by executives (Fleming & Spicer, 2007). Courpasson's work has shown that only collective and open forms of resistance are likely to be transformative and capable of influencing top management decisions (Courpasson, 2017; Courpasson et al., 2012, 2017; Sanson & Courpasson, 2022). Although Courpasson did not study resistance in SMO contexts or during transition dynamics, he has shown that in neoliberal and post-bureaucratic contexts, middle managers have the competences and resources to build collective and open forms of resistance able to alter top management decisions (Courpasson et al., 2021).

Despite the importance of the tensions and paradoxes that crystallize around middle managers during SMO transitions, their key role in these transitions, and their ability to foster collective and transformative forms of resistance, little is known about how middle managers react and potentially undermine SMO transitions. Accordingly, we focused on middle managers, and particularly their reactions as strategic change agents, victims, and potential resisters, to understand how they can support or hinder the success of SMO transitions.

Research design and case context

Case background

Yops, a French food company specializing in dairy products, was founded in 1953. When we started our research in 2013, Yops employed 80 people and had an annual turnover of nine million euros. The company is owned by a family whose eldest son – Simon – succeeded his father as CEO in 2009. We met Simon in a professional context in 2012. He told us that, inspired by the work of Isaac Getz (Carney & Getz, 2009; Getz, 2009; Getz & Carney, 2012), he intended to transform

the firm into a SMO, or more specifically a 'liberated firm'. For Khoury et al. (2024), liberated firms are the quintessential SMO form, as they involve the removal of formal titles and any hierarchical symbols or practices. Employees are given broad decision-making powers, including on strategic goals and recruitment policies (Khoury et al., 2024). Unlike other SMO forms, such as holacracy, liberated companies do not have a predefined organizational model, and the formulation of the control system is left to employees (Carney & Getz, 2009; Getz, 2011; Khoury et al., 2024). Following what he considered a 'new philosophy of management', one of Simon's main objectives was to erase all forms of manager-subordinate authority relationships and enforce a new form of organizational control based on the 'autonomy and responsibility' of empowered workers.

Yops appeared to be a unique opportunity to study, in real time, a transition into a radical form of SMO and Simon agreed to let us undertake longitudinal research. During the SMO transition process, we neither advised the CEO nor shared information or data with him. We began the research in January 2013, at the outset of the transition process. To our surprise, 2 years into the transition – in early 2015 – former middle managers launched an overt collective resistance movement against the SMO form. In 2016, this movement culminated in the CEO's decision to change his approach and officially reverse the SMO experiment, giving us the rare opportunity to study a transition failure in real time. Appendix I provides a timeline of events.

Before the transition to a SMO, in terms of organizational structure, Yops had departments in manufacturing, packaging, maintenance, R&D, sales/marketing, human resources, and quality, in addition to executive areas. The sanitary issues of food production required close attention and tightly coordinated efforts organized through a hierarchical control system that relied on 16 middle managers, monitoring tools, administrative procedures, and production reports. Middle managers were at the head of the functional and industrial departments and exercised control over individual and collective actions. They classically organized, coordinated, and controlled the work of subordinates and had the responsibility of interfacing with external stakeholders (Floyd & Wooldridge, 2017; Tarakci et al., 2023) (see Table I, column I for more information regarding the middle managers' role before the SMO transition).

In December 2012, Simon presented the new organizational principles to the executive team and told them he intended to implement them over the next year. While the executives were initially surprised by the announcement of the elimination of all forms of manager-subordinate relationship and hierarchical control, they quickly sought to understand the management and organizational principles of a liberated company.

At first, we thought, 'What is this thing? We [executives] had other problems to deal with right now!' [...] And then eventually ... well, in a somewhat individual manner... We reflected, read a lot, and were able to discuss these organizational models with people. I attended a training course. Some of us went to visit liberated firms [...]. We were excited. (Michel, executive manager)

This preparation created enthusiasm around participating in what they considered the modernization of management principles and improving their knowledge and practices by using a management philosophy they deemed *avant-garde*. However, they were aware of the difficulties the transition to a liberated company would pose, particularly for middle managers, due to the elimination of their roles and transfer of their prerogatives to workers.

After this preparatory phase with the executives, the official announcement of the transformation into a liberated firm was made to all staff during a seminar in January 2013. Simon presented his project for Yops and displayed the new organizational principles and guidelines. During this period, two types of reactions emerged among workers: some were enthusiastic and participative, while others were indifferent and wait-and-see.

At a staff meeting in July 2013, the CEO presented the new work organization to be operational the following September. This organization was based on the dissolution of the executive team and the entire hierarchical line. The managers would lose their hierarchical status. The former executive managers would become 'animators' of what the CEO named a 'culture of enhanced responsibility' and the middle managers had 2 months to think about how to reposition themselves. During this meeting, the CEO also asked the middle managers to develop worker autonomy and self-determination and to diffuse Yops' vision and new values. In September 2013, to support the SMO transition, Yops' organizational structure was profoundly transformed with (1) the disappearance of the executive team, (2) the disappearance of managers at all levels of the structure, (3) the configuration of autonomous teams of workers, and (4) the disappearance of most monitoring tools and bureaucratic processes. Table I describes the evolution of Yops' organizational structure and middle managers' role before the change to SMO, after the change to SMO, and after the reversion.

Methods and data

Data sources

Our data collection method involved interviews, observations, and archival research, collected in six sequences from January 2013 to June 2017. At each collection sequence, we conducted formal interviews with a range of actors. We also spent time in different parts of the organization, having lunch

Table 1. Evolution of Yops' organizational structure and middle managers' role

	Before the SMO transition	During the SMO transition	After the abandonment of the SMO
1	Four levels of hierarchy between the CEO and the workers.	The hierarchy is centralized under the CEO.	Two levels of hierarchy between the CEO and the workers.
2	Middle management allocates, designs, and coordinates the work of workers and teams.	Teams manage their own work, elect one person to coordinate information for them.	Middle managers coordinate the work of workers and teams. Workers participate to the design and allocation of teamwork.
3	Workers have little input into work-related decisions. Middle managers make all decisions and give all directions.	Team members make their own decisions within guidelines set by the CEO – the company mission, vision statements, and new values.	Workers participate in work-related decisions made by management.
4	Middle management control workers use monitoring tools and reports.	Team members control themselves.	Middle managers control workers using monitoring tools and reports. Workers participate in the design of these tools.
5	Middle management hires new workers.	Team members hire their own members.	Middle management hires new workers.
6	Middle managers are labeled 'managers'.	Middle managers lose their 'manager' label. They reposition themselves as members of a self-managed team or join new projects they have to invent. They must transfer control and managerial activities to workers and become 'autonomy generators'.	Middle managers are labeled 'facilitators'.

Source: own elaboration.
SMO, self-managing organization.

and sharing breaks with employees in an effort to learn about the SMO transition, while capturing members' subjective understandings of their own roles and experiences within the transition. These included how their understandings of the organization evolved and how they adapted. The research was conducted transparently with Yops' members who were aware of the purpose of the research and consented to participate. Appendices 2 and 3 present our methodological objectives for each type of data collected and their use in our analytical protocol.

Interviews

We conducted 38 interviews with 19 Yops employees across various ranks (CEO, executives, middle managers, workers). Interviews were carried out in six sequences between February 2013 and April 2017 and each interviewee was interviewed between one and six times. The first series of interviews was conducted in February 2013, 2 weeks after the announcement and official launch of Yops' transformation into a SMO. The second series was conducted between October and December 2013, at the beginning of the disappearance of the managerial relationships and the transformation of control. The third series was conducted in June 2014, with the CEO and two former middle managers who had previously expressed difficulty in repositioning themselves in the new organization. The fourth round of interviews was conducted between April and June 2015. During this series of interviews, we were surprised to discover the collective

resistance of former middle managers to the disappearance of manager–subordinate authority relationships and transformation of control. The fifth round was conducted in January 2016, a period during which our access to the site became more difficult due to the internal difficulties encountered by Yops. In June 2017, we had a final interview with the CEO, who presented to us the new organization of work characterized by a formal return to hierarchical control and managerial relationships, marking the end of the SMO experiment.

In situ observations

Our presence at Yops' sites over this period allowed us to complement our data collection with *in situ* observations. Two of the three authors circulated around workspaces and break rooms and took handwritten notes. These observations provided us with examples of the transformation of material elements (work and break spaces, documents displayed on the wall) and interactions in the workplace, as well as opportunities to examine the mindsets of Yops' members. Our *in situ* observations were used as supportive documentation for our interviews and helped us orient interview questions toward new themes and topics.

Secondary data

Our contacts provided us with internal documents, including strategic plans, organization charts, internal and external

communication documents, and quality-control documents. We completed this secondary data collection by producing a press kit based on articles from the local newspaper and the internet presenting the SMO experience enforced at Yops. We also recorded and transcribed the CEO's speeches at two conferences in academic and professional circles.

Data analysis

The data collected were analyzed through a qualitative and inductive approach. During the first 2 years of our research, data were analyzed to document the SMO transition and more specifically, to study how roles were changing and how organizational members were adapting. However, 2 years after the start of our research, the collective resistance of former middle managers constituted a turning point in the dynamic of the transition and a 'surprise moment' in our research. It became clear that the reactions of former middle managers were key in the SMO transition process and capable of modifying its trajectory. It was also clear that the paradoxical situation they were experiencing was at the heart of this resistance movement. This surprise moment influenced the guiding research question, as we decided to focus our investigation on how the former middle managers reacted to the disappearance of manager-subordinate authority relationships and the transformation of control during a transition to SMO. We then sought to generate more in-depth information on the history and effects of the SMO transition on the middle managers, by retrospectively revisiting our data. At that time, we did not yet know that a case of transition failure was developing before our eyes. We took notice of this failure in 2017, during an interview with the CEO, which was the second decisive moment in our research, shedding new light on the history and analysis of the reactions and resistance of the former middle managers.

Following a Gioia protocol (Gioia et al., 2013), we engaged in a first-order analysis of the former middle managers' reactions and coded interviews, documentation, and observations. We also analyzed the events and elements conditioning these reactions and their consequences. In line with the Gioia protocol, we then moved to a second coding phase and identified the relationships between the first-order codes to regroup them into second-order themes (Gioia et al., 2013). During this iterative process to refine the data into conceptual categories, we drew on the literature on SMO middle managers as strategic change agents and resisters, which helped us make sense of the data. This process of coding led to eight second-order themes. During the third phase of coding, we aggregated those eight second-order practices into four constructs. Our first aggregate construct – paradoxical situation – describes the situation in which former middle managers experimented with roles that were in contradiction and felt

tensions concerning their identity. Our second construct – external criticism – describes how former middle managers were exposed to external criticism regarding the disappearance of their role in Yops' control system. Our third construct – middle managers' resistance – describes middle managers' resistance to the transition. Our fourth construct – SMO transition reversed – describes the ultimate crumbling of the transition attempt and reverting to a hierarchical form of control. Figure 1 presents our data structure. Appendix 4 provides supplementary illustrations of our coding from our interview data.

Findings: Removing and restoring hierarchical control

Our analysis revealed four central findings regarding the situation, control implications, reactions, and outcomes of the SMO transition. Specifically, the transition (1) plunged the former middle managers into a paradoxical situation and (2) exposed them to criticism formulated by external stakeholders regarding the erosion of hierarchical control and the disappearance of manager-subordinate authority relationships. (3) They reacted to this paradoxical situation and external criticism by developing three forms of resistance – individual hidden, collective hidden, and collective public – that led to (4) the abandonment of the SMO experiment.

Middle managers plunged into a paradoxical situation

The transition of Yop into a SMO exposed the former middle managers to a paradoxical situation in which they had to experiment with contradictory roles and experienced identity tensions.

Paradoxical roles

After the official announcement of the suppression of the executive committee and entire hierarchical line, the CEO instructed the former middle managers to transfer their control and managerial activities to the workers and reposition themselves as 'autonomy generators'.

In practice, the former middle managers, with some exceptions, actively participated in the empowerment of their teams. They worked to transfer their activities and working tools. They trained workers to use planning tools and organize work and showed how and where to apply resources and make decisions in the case of production problems. Raymond, a former middle manager, described the progressive slip of his managerial and control activities into the hands of the workers.

I explained to them how I went about organizing work from a production command. I no longer control their comings and goings,

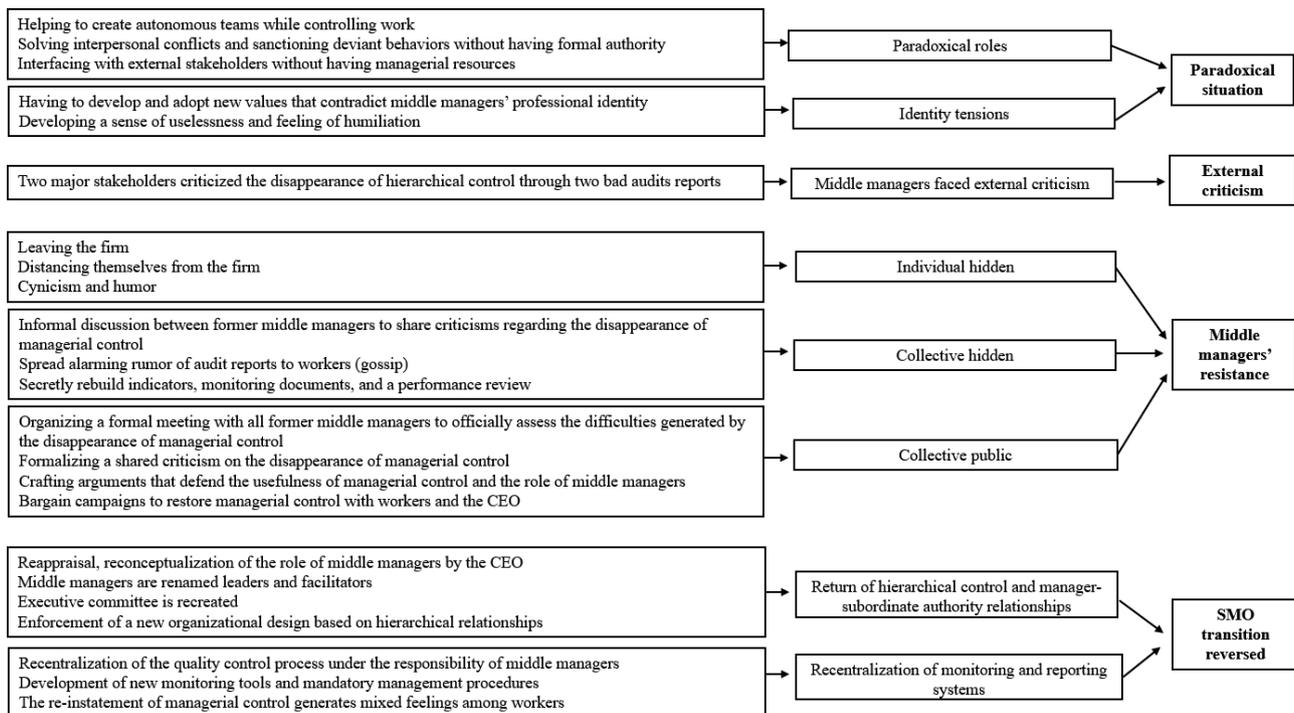


Figure 1. Data structure.

Source: own elaboration

or the ways they do their work. But I still make sure that there are no delays on the production planning. Yesterday, there was an anomaly because of a badly written instruction. I decided not to get involved at all. I was afraid that the operators would panic, but no, they handled the situation themselves. (Raymond, former middle manager)

'I was afraid' reflects the tensions that Raymond experienced in his effort to empower his team. It suggests the contradiction experienced by this middle manager, who needed to step back but still felt responsible for the behavior of those who had been his subordinates. Overall, the former middle managers reported contradictory experiences in their efforts to empower the workers, in that they were regularly called on by workers to intervene, correct, and give solutions to assure a minimum of team functioning. At a lunch break with us, Rosa stressed this paradoxical need for continued managerial help for 'her team':

It's not always easy for them. The women on the shop floor ask permission for any little thing. The other day they wanted to manage a change in production format by themselves. A worker called me to ask if it was really OK for them to manage these changes. I said yes. (Rosa, former middle manager)

This vignette illustrates how the 'disappearance of managers' announced by the CEO both induced former middle managers to progressively give up control activities while maintaining their previous role in guiding and overseeing what was supposed to be 'autonomous' workers. It also illustrates the ambivalence of

their position as a source of 'permission' to be autonomous. This paradoxical situation was sustained by the workers who, struggling with autonomy, pushed their former middle managers to partially maintain control and authority over their work.

One year into the transition process, the former middle managers were expected to have fully transferred decision-making capabilities concerning production schedules, task allocation, and cross-team/unit coordination, the latter now performed by team-elected coordinators. Nevertheless, workers still struggled to set their own control rules and practices and especially, to sanction deviant team members and self-supervise. Rosa told us how, answering to workers' request, the former middle managers still intervened to solve interpersonal conflicts and sanction deviant behaviors.

Rosa: When there are big problems that they can't solve amongst themselves, they still call me. When someone needs to be straightened out, they still can't take it upon themselves. We gave a chewing out recently because of a 'black sheep'. Nicholas [another former middle manager] and I told him to calm down. His team members came to us and said look he leaves 15 min. early every day [...]. It's not easy, letting the team members resolve their own conflicts.

Researcher: But wait, why does he still respect your authority, if there's no longer any hierarchical relationship between you and him?

Rosa: I don't know. Maybe it's a residual effect. Maybe in two years, with new recruits, it won't work anymore.... I don't know. To be

honest, I'm not even sure that our chewing out will change that person's behavior. (Rosa, former middle manager)

This vignette depicts the paradox of having to suppress managerial authority while keeping it in case of deviant behaviors and interpersonal conflicts. It reflects the contradiction of having to solve conflicts without formal sanctioning power and having to act as a hierarchical manager while not being one formally.

Moreover, the former middle managers were also asked to maintain their interface role at the external boundaries of the organization. In other words, they were to continue spanning the boundary between Yops and its external stakeholders, maintaining collaborations and smooth coordination with these external parties. Nevertheless, although former middle managers maintained their interface roles, these were reduced in scope in the young SMO. Nicholas, a former middle manager, described lacking the internal resources and authority to translate external demands into internal responses and thus effectively coordinate Yops with its stakeholders:

I am always interfacing with clients, but I no longer control the teams. As a result, I have to send messages to the operators regarding orders, deadlines, and quality demands. But I don't go further than that. Today, I have to pass along customers' expectations but without the ability to direct workers. (Nicholas, former middle manager)

Having to interface without internal authority once again positioned the former middle managers in a paradoxical situation, creating a demand without the possibility of meeting it.

Identity tensions

The CEO was aware that the SMO transition implied that the middle managers would have to adopt and diffuse values that supported the new management principles, even when they were in contradiction with their identity as managers. He was also aware that this would inevitably generate significant tensions for them.

The values [of autonomy, responsibility, and empowerment] must shape our [new] work culture... I have warned them [the middle managers]; I told them, 'Values are not neutral, we are really going to act consistently with them'. (Simon, CEO of Yops)

The former middle managers felt the paradoxical nature of this demand imposed by the CEO considering who they were and the values they had integrated throughout their professional journey.

It's unsettling for a person like me who has been a manager for a while, who had ways of working. The principles of 'I plan, I control, I coordinate' are disappearing. If we don't make them disappear, we will have problems because we will be out of alignment. And

it is very hard for someone with a mentality of 'I studied, I have a degree, I am the decision-maker' ... everything collapses. And that's difficult. That's where a lot of humility is needed. (Nicholas, former middle manager)

This reference to the 'collapse' of the values of control and hierarchy that underpinned the identity of the middle managers highlights the intensity of the tensions they experienced. These tensions were also heightened by a sense of uselessness that several middle managers described during the SMO transition. For Yops, the transfer of managerial activities and the empowerment of the workers had positive impacts, as Rosa explained: 'Instead of making 12,000 packs per day, they now do 14,000 at the same cost'. Brice, observing that the work they did to transfer control activities, and the disappearance of their previous role had generated these positive effects, expressed a feeling of uselessness:

I must admit that I've asked myself what I'm still doing here. I'm slowly being inched to the exit door! And it's a bit humiliating also because you lose your status, and people start taking jabs at you. For example, the workers say, 'So then, what are you going to do now that we can just ignore you? And your wages? Will they stay the same?' (Brice, former middle manager)

Brice's sense of humiliation and feelings of uselessness were reinforced by the 'jabs' of workers. For Henry these feelings were exacerbated when the CEO sanctioned a former middle manager who had continued perpetuating the values of hierarchy and authority:

My great fear is to go through what happened to Denis. He was a very authoritarian manager and blocked everything [...]. The CEO kicked him out. He was demoted to the level of his employees and is no longer a manager: [...] His team took control of itself. His management techniques were abandoned, and the team made its own tools that fit them better. And it works better! So, we realized that when we [managers] make decisions from the safety of our offices, it doesn't fit the needs on the ground. I asked myself, 'If they got rid of Denis, what if I'm the same, what if I'm messing up the whole system by myself?' But at some point, either one reassures oneself, or it becomes unbearable, and one leaves. The worst is when you realize it works better when you're not there. (Henry, former executive)

Henry's fears of 'messing up the whole system' and watching as the team 'works better when you are not there' were deeply troubling concerns leading to identity tensions.

Middle managers resistance: From individual and hidden to collective and open

Plunged into a paradox of having to implement their own demise, former middle managers experienced profound

discontent, which fed individual practices of micro-resistance. But this individual and hidden resistance gradually evolved into a collective form after strategic stakeholders expressed criticism regarding the disappearance of hierarchical control. Former middle managers progressively combined their actions into an open struggle against the disappearance of hierarchical control and manager–subordinate authority relationships.

Individual hidden resistance

During the transition process, three middle managers left Yops, an equivocal and ambiguous act leading to speculation about the link between the contradictions and tensions they faced and their decision to quit. For those who stayed, the situation was not less difficult, and they developed practices of individual resistance often involving cynicism, sarcasm, and humor, as Raymond explained to us.

I felt frustration. I had always done what was asked and from one day to the next it was no longer enough. I had to do a self-negating gesture and go along with this whole masquerade. It was difficult. To make it, I had to step back, and it was my non-professional activities that helped me. I am a football coach. I have a life outside of the organization that allowed me to stay fulfilled. (Raymond, former middle manager)

Termining the transition into a SMO ‘this whole masquerade’ shows the cynicism that Raymond had to develop to support the situation. To remain seemingly compliant while regulating his ‘frustration’, Raymond distanced himself from Yops by reassessing the extra-professional part of his life to better distance himself from the company and his work.

Such practices of hidden resistance were widespread among the former middle managers we interviewed. As she left our interview, Gladys turned around and exclaimed sarcastically, ‘Next time you come to see us, we’ll all be in yoga and meditation mode’. Similarly, Brice noted the ‘beautiful’ rhetoric of the CEO with a thinly veiled irony: ‘Here, it seems like we’re at the avant-garde! We see our CEO in the local media talking about his avant-garde vision of management, with his beautiful formula “he who knows, does it.”’

External criticism as pivotal event

One event transformed the former middle managers’ resistance. In December 2014, 2 years after the formal SMO launch, two audits were conducted only weeks apart, by two different key stakeholders – a major client and the national food administration. Because of their skills and former experiences with audits, three former middle managers (Rosa, Nicholas, & Brice) were mobilized to be direct interlocutors with the auditors. During these audits, a slight increase in malfunctions was noted.

Recognizing the quality problem, the former middle managers noted their inability to explain its origins. When the auditors asked for quality indicators and the latest performance review to identify the malfunctions’ origins, they discovered the lack of hierarchical control, which was articulated with gusto by the former middle managers:

I told the auditor that we no longer had the indicators to verify what he was asking us. [...] When he [the auditor] asked me why [...], I gave a clear answer: managers are no longer there to supervise and ensure quality. (Nicholas, former middle manager)

After the audit I told myself that I couldn’t respond to those expectations. I was tool-less because it was no longer possible for me to go find the self-managed teams to revise their methods and implement new metrics that would address the criticisms and messages sent by our auditors. (Brice, former middle manager)

The trio of former middle managers involved in the audit process received two reports in which it was clearly noted that due to the new organization of work there was a ‘lack of solid foundations in terms of operational documentation, management, and production quality assurance, which puts the quality and traceability of finished products at risk’ (research notes taken while a former middle manager was reading one of the two bad audit reports). The CEO received these negative audit reports without much concern, focusing primarily on not disrupting the new values and organizational principles of Yops. From this perspective, he believed that he should let the former middle managers and autonomous workers find ways to address the highlighted deficiencies. Therefore, in the weeks following the receipt of the two negative reports, the top management made no decisions related to them.

Collective hidden resistance

Following the two audits, however, the three directly implicated former middle managers began to organize informal and secret discussions in which they shared their individual experiences and conclusions regarding the audits:

After the audit, I first went to speak with Rosa. I understood that we were on the same wavelength. She told me that Brice was in the same state of mind [...]. We talked a lot with some other [former middle managers] after receiving the bad audit reports. Why it was necessary to track, document discrepancies, have quality indicators. [...] All these conversations brought back a better understanding of our role and what we provided to workers. (Nicholas, former middle manager)

Nicholas’ description clarifies how the external criticism formulated into the negative audit reports provided a trigger event that broke their isolation and allowed the emergence of a secret enclave among some former middle managers, in

which they discursively worked to build the case for the necessity of hierarchical control and manager-subordinate authority relationships. The discussions on the de-stigmatization of the middle managers' traditional role were made possible by the existence of this external and critical viewpoint. It also gave them the needed self-confidence to reaffirm their importance within the organization ('our role and what we provide to workers'). This critical coordination and secret consultation were the first form of collective resistance against the removal of hierarchical control and would be followed by other clandestine actions.

Of these next actions, the first was the spreading of rumors within the self-managed teams about a threat of stakeholder withdrawal. Our interviews with workers suggested that these rumors created anxiety and apprehension. For instance, Liza, a worker, explained:

This discussion with our former [middle] manager has thrown me for a loop. The audit reports were really bad. They indicate a big problem with the quality organization. I didn't think it would come to this! To risk closing down the plant because we're cutting back on paperwork. (Liza, worker)

Similarly, Mike, from a different team, noted: 'It was anxiety-provoking because we were hearing things: "Now we've lost everything, we've destroyed everything! Everything! The quality level fell dramatically! We risk losing our jobs!"' Both Mike's and Liza's reactions demonstrate the circulation and amplification of the auditors' conversations into an existential crisis for the organization, catalyzed by the disgruntled former middle managers.

In parallel, the former middle managers clandestinely reconstructed a few quality indicators and reestablished a performance review that had been eliminated. Obviously, these clandestine indicators could not be built from direct production monitoring, which had been abolished. Rather, they assembled indirect information in an improvised way, counting the number of anomalies and complaints reported by customers, as described by Allan:

One of the first things I did after the audits was to ask two colleagues [former middle managers] to help me discreetly recreate some of the control indicators. Since all the indicators that had existed across the departments had been eliminated, and since I couldn't reimpose them formally, we sort of built in a synthetic way an image of the production defects and the client complaints. (Allan, former middle manager)

Allan's quote illustrates the conscious but secret ('discreetly') reconstruction of a countercurrent involving centralized control techniques, allowing the former middle managers to collect proofs of defects that could be used to subsequently render public the costs and effects of removing hierarchical

control. During this period, the CEO did not notice that the former middle managers were rebuilding monitoring indicators and spreading alarming rumors about the consequences of the SMO transition among the workers.

Collective public resistance

The making public of this increasingly collective form of resistance began with the organization of a formal meeting for all former middle managers organized by Brice, Rosa, and Nicholas. The meeting was called with the following agenda: 'Sharing assessments of the external difficulties generated by the new organization'. The bad audit reports and the clandestine performance review, with indicators, were collectively presented:

I presented the audit report and the rebuilt indicators and performance review. The conversations that followed obviously focused on the fact that we are in a very standardized industry, and we cannot, under the pretext that we are in a 'liberated company', say: 'No, I am not going to do this or that anymore!' [...] We all agreed, 'if we ignore these standards, it's simple: we go out of business'. (Allan, former middle manager)

As Allan's quote describes, the clandestine performance review played a key role in helping the former middle managers collectively construct and stabilize their criticism of the SMO and prepare for an open confrontation. Raymond, a former middle manager, noted that the meeting was 'a real success. The indicators to be restored have been identified [...] We left the meeting with proposals made by the group to improve control'. Most importantly, however, the meeting galvanized the necessity for the return of manager-subordinate authority relationships:

We were all in agreement: we need managers! Someone whose main job will be to follow up on improvement actions, to see if the documentation is in the right place, whether it's up to date, who analyzes, who puts things into perspective for our clients, etc. Someone in production can't be everywhere and do that job. (Nicholas, former middle manager)

Through the collective exchange of arguments and opinions, the former middle managers were able to regain a sense of group confidence, destigmatize their role in the organization ('We need managers'), and defend their position to other members of Yops. After this meeting, they began overt bargaining efforts, first downward, with workers, and then upward, with the CEO.

In each self-managed team, former middle managers organized meetings using the audit reports, clandestine indicators, and performance review. We observed during our interviews and visits to Yops that they posted these documents on walls in three different public spots in the workplace. In ongoing

meetings with the workers, the former middle managers argued for the re-instantiation of control indicators to meet external norms. One worker, Steny, described these ongoing discursive attempts:

We talked with Nicholas, and he explained what the client and the national food administration expected. He showed us indicators that they had reconstructed to at least attain a minimum level of results, and why it was important to measure those things. [...] Our ex-managers presumably understand what needs to be shown to the clients. [...] If this is needed for our agreements, we have to do it. I can't bring myself to say: 'No, I don't care about the agreements'. (Steny, worker)

Steny's quote shows how the subtle mobilization of external criticism rendered it difficult for workers to doubt the importance of returning to hierarchical control and manager–subordinate authority relationships for Yops' survival. The open resistance practices of the former middle managers spread doubt and concern among the workers. During a coffee break, six workers told us that the factory members believed they were taking a lot of risks with this new organization of work.

Regarding their upward relations, the former middle managers began to defend the reinstatement of hierarchical control to the CEO, mobilizing the 'indisputability' of the external stakeholders' criticisms:

They put the response to the audit reports on the agenda of the meeting. They came with reconstructed quality documents, charts. They made their case point by point [...]: 'Without these indicators, this document, we're going to be given a yellow card!' (Simon, CEO)

Notably, the 'yellow card' metaphor frames the external stakeholders as judges and ultimate arbitrators of internal activity, strategically thwarting debate and framing the return of hierarchical control as a sensible response to an externally imposed reality and threat.

Similarly, the appeal to the CEO questioned the underlying meaning of hierarchy, redirecting its focus on non-stigmatized attributes. Mixing arguments around manager–subordinate authority relationships with workers autonomy, the emerging countermovement argued that hybridizing these two principles would create a win-win situation. 'Managerial rigor' was rhetorically coupled with 'relational partnering', between 'force of proposal [orig. *force de proposition*]' and 'worker intelligence'. This reevaluation of hierarchical control allowed former middle managers to advocate for the return of a recalibrated role without directly contradicting the principle of worker autonomy. In addition, the former middle managers provided the CEO with evidence of 'worried' workers (that they themselves had groomed), who were ready to accept the return of manager–subordinate authority relationships.

We told him [the CEO] about the reactions of the workers. People are worried. They understand the demands of having an organized and controlled system. [...] Having a framework is important so that people feel more comfortable without being relieved of all responsibility. (Nicholas, former middle manager)

They were thus able to avoid the interpretation of professional self-interest by displacing responsibility onto external stakeholders, focusing on firm performance, and showing concern for employee anxiety.

SMO transition reversed

The former middle managers' collective resistance campaign was ultimately followed by the CEO's decision to revoke the suppression of hierarchical control and manager–subordinate authority relationships. Their efforts resulted in the formal termination of the SMO experiment in September 2016.

Return of hierarchical control and manager–subordinate authority relationships

During our last meeting with the CEO, he admitted his mistakes regarding the disappearance of middle managers. The new organizational design of Yops, presented to us by the CEO in June 2017, involved the rehabilitation of the status of managers. Hierarchical relationships were reestablished but with the caveat that the managerial style should support responsibility, initiative-taking, and worker engagement. The resulting hierarchy was slightly more horizontal than the original form and composed of three levels: (1) the CEO, (2) leaders, and (3) facilitators. The new label 'facilitators', applied to the former middle managers, designating a mix between the principles of hierarchical relationships and worker autonomy, seeking some acknowledgment of the SMO experiment. Another important transformation accompanied the renunciation by the CEO: the rehabilitation of the executive management team (executive committee), renamed the 'strategic committee' composed of 'leaders'. Again, this renaming gestured to the values of autonomy, removing the term 'executive' and avoiding the impression of a complete return to the past.

Recentralization of monitoring and reporting systems

The firm's reconfiguration in the post-SMO phase also involved reestablishing monitoring and reporting systems in the hands of middle managers. Monitoring tools that had been eliminated during the SMO transition were formally reintroduced. A significant number of procedures and metrics were rebuilt or created by capitalizing on the clandestine work of middle managers who had already cobbled together preliminary indicators and pinpointed those that needed to be rebuilt or developed.

This return of hierarchical relationships and control procedures was established 'quite naturally', as expressed by several members of Yops. According to Brice, whose middle manager status was reinstated, many workers were happy and reassured about the resurrection of the older organizational form:

A technician came to me and said: 'Anyway, my job no longer satisfies me. I am no longer a technician. I spend my time explaining to colleagues what we do and that's not my job. If you come back to filter all that information, I can rediscover my technical expertise, get my tools back, do my interventions. That's fine with me'. (Brice, former middle manager)

Brice's story suggests that the workers preferred the return of the middle managers to being 'burdened' by managerial activities themselves, creating a win-win situation. Other workers, however, who spoke to us directly, were less positive about the return of manager-subordinate authority relationships and centralized control:

We're now talking again about hierarchy, about control, respecting procedures, regular reporting. When there's a problem, we have to tell the manager: It's done with a light touch, but we can feel that it's the end of an era. [...] What explains this backtracking? Since we've had tough times, some took advantage of it to say: 'It's the fault of the liberated company'. Also, a hierarchical posture among certain people that is very important, who can't imagine themselves without a formal title. (Liza, worker)

Middle managers reactions during SMO transition: A synthesis

Our empirical findings at Yops show how former middle managers, expected to erase any forms of manager-subordinate authority relationships and enforce a system of control without hierarchy, experienced a paradoxical situation, and engaged in collective resistance aimed at a restoration of their status and control prerogatives. The Yops case highlights a SMO transition that derailed through the collective resistance of former middle managers. This failed process started with disoriented former middle managers pushed to be the 'architects of their own demise' by the CEO, who thought that middle managers 'were relics of the past'.

This transition plunged them into a paradoxical situation in which they had a mandate to deconstruct and eliminate their position and role in the organization to empower workers and participate in the enforcement of a new system of control. They faced the contradiction of having to destruct their authority while still mobilizing it to intervene in the problems and conflicts of self-managed teams. Moreover, while maintaining their interface roles with external stakeholders, former middle managers were limited to information transmission

and lacked the authority to impose external demands on autonomous workers. They also felt identity tensions in their efforts to spread and adopt values that contradicted with their previous identity and generated a feeling of uselessness and humiliation. This paradoxical situation, in which they were both the agents and primary victims of the transition process, pushed some former middle managers to leave the company. Those who stayed individually developed cynicism, irony, and humor and self-distanced from the organization (Mumby et al., 2017; Scott, 1990). These individual and hidden forms of resistance functioned as 'safety valves' to endure role contradictions and identity tensions (Fleming & Spicer, 2007).

Drawing on external criticisms regarding the erosion of hierarchical control acted as a pivotal event to collectivize former middle managers' individualized sentiments, shifting individual and hidden resistance to collective. External criticisms allowed open communication between former middle managers, who now shared among themselves the resentments previously kept private. The resulting communication constituted a cohesive managerial kernel that struggled against the stigmatization and disappearance of a central aspect of their identity and organizational role: hierarchical control. Organizing clandestine actions allowed them to sow doubts around the SMO transition and build the tools and arguments used to defend their role as middle managers.

This clandestine groundwork gave rise to a second resistance moment when the former middle managers made their disagreements publicly known. In this new phase of resistance, external criticisms were mobilized, constituting an argument that was difficult to oppose. Similarly, clandestine control metrics were a key element of resistance, making it possible to re-legitimize the role of middle managers in the control system by demonstrating expert use of knowledge tools.

Ultimately, the collective resistance succeeded in developing arguments and tools to convince the CEO to restore hierarchical control and consequently, reverse the SMO transition.

Discussion

In this paper, we analyzed how former middle managers responded to the disappearance of hierarchical authority relationships and transformation of control during a SMO transition. Specifically, we showed that they were confronted with a paradoxical situation that led them to engage in an escalation process of resistance. In our case, this resistance process culminated in the subversion of the SMO experiment. Our study has resulted in insights that have implications for the analysis of the role of middle managers in SMO transition failures and the various and complementary forms of middle managerial resistance, which we discuss in the following section, suggesting areas for future research.

Middle management paradox and SMO transition failure

Our findings first contribute to the analysis of SMO transition difficulties, and more specifically, failure dynamics, by documenting the reactions of middle managers. Previous studies have shown that the transformation of organizational control from coercive to concertive forms (Barker, 1993) generates multiple difficulties, and in practice, failures are more numerous than successes (Lee, 2024). Recent studies have suggested that one key explanation for these transition difficulties can be found in middle managers' reactions (Livijn, 2019; Maurer et al., 2024; Schell & Bischof, 2022). However, the practical and mundane difficulties and reactions of middle managers during SMO transitions, and their involvement in dynamics of failure, deserved further scrutiny. Our results address these key gaps by (1) documenting a middle management paradox constitutive of SMO transition while (2) extending our knowledge of failure dynamics directly linked to a misunderstanding of this paradox by executives.

Regarding the documentation of the middle management paradox constitutive of SMO transition, we shed light on its practical and cognitive dimensions. In the practical dimension, middle managers must eliminate their hierarchical authority and control over workers while mobilizing this authority and control to address organizational issues and interpersonal conflicts generated by this elimination. This paradox also means middle managers have the responsibility to maintain a smooth interface with external stakeholders without having the organizational and managerial levers to meet their expectations. In the cognitive dimension, middle managers have to actively participate in the diffusion of new values in favor of workers autonomy, self-management, and the dismantling of bureaucracy, contradicting how they understood their work individually and professionally.

In addition, we note that most studies of SMO transitions have focused on their internal tensions and difficulties (Lee & Edmondson, 2017; Maurer et al., 2024), while our findings suggest that external tensions and pressures provide key points of leverage for internal transition dynamics. Because of their internal and external boundary position (Azambuja et al., 2023), middle managers are confronted with contradictory expectations that exacerbate the paradoxical situation they face. Future research should more closely investigate how internal and external sources of contradictions interact and threaten SMO transitions by reinforcing the middle management paradox: which external pressures are more likely to exacerbate the internal contradictions they face?

If the middle management paradox and its various facets appear to be a constitutive element of SMO transitions, our

empirical results also suggest that it was misunderstood by Simon, the CEO of Yops. As he told us during interviews, he knew that middle managers were experiencing hard times, but he adopted a passive attitude, leaving the middle managers to find their own way. As a result, the middle managers' responses were built over time in a defensive manner. As documented by the paradox literature, this type of defensive response is generally associated with 'spiraling conflicts and vicious circles' and can lead concerned organizational actors to leave the organization or decide to privilege one pole of the paradox, even if it means generating tensions and opposition with top management, possibly further exacerbating the difficulties experienced (Luscher et al., 2006, p. 249).

The executives' misunderstanding of the middle management paradox appears to be a key source of failure dynamics during SMO transitions. This paradox, however, does not determine organizational outcomes, as the paradox literature has shown (Santistevan et al., 2024). Organizational actors can find and build compromises to deal with the paradox on a longer-term basis (Luscher et al., 2006; Pradies et al., 2021). Contrary to what we observed at Yops, future research should document the capacity of executives to build compromises around the middle management paradox. In the case we observed, the CEO reinforced the paradox through his authoritarian, top-down, and brutal approach toward middle managers. Letierce et al. show that the quality of relationships and mutual trust between executives and middle management are key ingredients in change management (Letierce et al., 2023). Moreover, unlike the case studied by Daudigeos et al. (2021), in which criticism by organizational members was allowed and instrumentalized by the top management, this criticism was not encouraged or used in the Yops case. This insight invites us to consider more generally that the implementation of a critical and controlled expression of former middle managers can crucially shape the outcomes of SMO transitions. The nuances of how and in what circumstances middle managers are led to subvert their own roles seems to make a significant difference between SMO transition successes and failures.

Finally, it also seems important to study how the choice of a specific form of SMO (e.g., liberated company, spaghetti organization, holacracy) by executives leads to an intensification or mitigation of the middle management paradox. Among the forms of SMO, the liberated company is the most radical (Khoury et al., 2024) and seems to expose middle managers to the strongest level of contradictions. How middle managerial dynamics play out in less radical forms of organizational experimentation would provide important boundary conditions to the current study's findings.

Architects of their own resurrection: When middle managers are engaged in a resistance escalation process

Our findings contribute to the analysis of middle managers' resistance during SMO transitions by identifying an 'escalation process' (Fleming & Spicer, 2007) that (1) started with an individual and hidden resistance regarding the SMO transition; (2) shifted toward a collective and hidden form; and finally, (3) culminated in an overt and collective resistance that pushed the CEO to give up his project. These findings offer original insights into the connections between these three forms of resistance and provide original knowledge to explain the transition from one form to another.

In our case, the resistance of former middle managers began with an individual and hidden form (Scott, 1985) which served as a 'safety valve' (Fleming & Sturdy, 2011), allowing former middle managers to endure the role contradictions and identity tensions they experienced as architects of their own demise (Maurer et al., 2024). Former middle managers individually developed cynicism, irony, humor, and self-distancing from the organization (Mumby et al., 2017; Scott, 1990). While some authors may consider this form of resistance to be 'decaf resistance' (Contu, 2008), and politically unproductive (Mumby et al., 2017), in our case, it proved to be the starting point of the escalation process we observed and can be considered the 'stubborn bedrock upon which other forms of resistance may grow' (Scott, 1985, p. 273). It produced a virtual community of isolated resisting middle managers who felt at odds with the SMO transition process.

A key event broke the isolation of this virtual community of resisters and allowed the emergence of an 'enclave insurgency' (Courpasson et al., 2012, p. 6): the receipt of negative audit reports transmitted by external stakeholders. These reports sparked conversations between a trio of former middle managers, who secretly communicated their fears, concerns, and emotions related to the SMO transition. This 'enclave insurgency' clandestinely brought together a larger group of former middle managers, who shared the conviction that the SMO transition jeopardized their jobs and ultimately threatened the entire organization. This secret resisting enclave laid the groundwork for various political actions against the SMO transition through clandestine efforts to structure objects of resistance (Courpasson et al., 2012; Taskin et al., 2023).

This shift from individual and hidden resistance to a collective form is considered a central element in resistance dynamics within post-bureaucratic organizational contexts; however, it remains empirically under documented (Contu, 2008; Courpasson et al., 2021). Our research offers original insights about the boundary conditions that allow the transition from individual to collective hidden forms of resistance. Our empirical case shows that external criticism expressed by strategic

stakeholders constitutes a trigger and a key resource that enabled former middle managers to break their silence and isolation and foster a sense of solidarity and shared destiny. Future research should document the elements likely to break the isolation of former middle managers engaged in a SMO transition and identify the internal and external resources they are able to mobilize to bring about a secret resisting enclave. Our findings also indicate the fact that this hidden community of resisters operates beyond merely sharing emotions and resentment. It is structured around objects of resistance (reports, crafted indicators, posters, performance reviews in our case) whose nature and function need to be better understood. Can a hidden community of resisters exist without objects of resistance? What roles do these objects play in the formation and maintenance of the hidden community? Are they indispensable elements for solidifying trust and solidarity among isolated and endangered actors?

The third stage of the escalation process is composed of an overt and collective form of resistance that has barely been documented by post-bureaucratic organizational scholars and, to our knowledge, never during SMO transitions. Our results allow for a better understanding of how collective and hidden forms of resistance prepare and secure the phase of collective and overt mobilization that leads to productive resistance (Courpasson et al., 2012). The resistance materials, prepared in secrecy, were shared through a gradual process of public disclosure and through the dissemination of posts and documents related to negative audit reports and the critical analyses formulated by former middle managers. The progressive publicization allowed the middle managers to 'play on both overt and covert terrains, on both observable and hidden tactics' (Taskin et al., 2023, p. 739). By doing so, they limited the risks of individual reprisals. In addition, former middle managers engaged in informal conversations with workers, a significant portion of whom rallied to the analyses and concerns advocated by their former bosses. The only thing left for the middle managers to do was to engage directly with the CEO, avoiding an adversarial perspective by using a hybrid justification regime (Daudigeos et al., 2021) that had been secretly prepared and collectively tested during the previous resistance phase. They mixed various discursive elements to make their arguments audible and to convince the CEO that they were ready and able to reframe their hierarchical prerogatives to achieve mutual gains without directly contradicting the principle of worker autonomy. We summarize the unfolding of this resistance escalation process in Figure 2.

These empirical results show the interrelation between the hidden/collective and collective/overt forms of resistance. They confirm that the skillful work of resisters and the creation of powerful 'objects of resistance' are key resources for resistance to become progressively visible and productive (Courpasson et al., 2012; Taskin et al., 2023). Future work should aim to

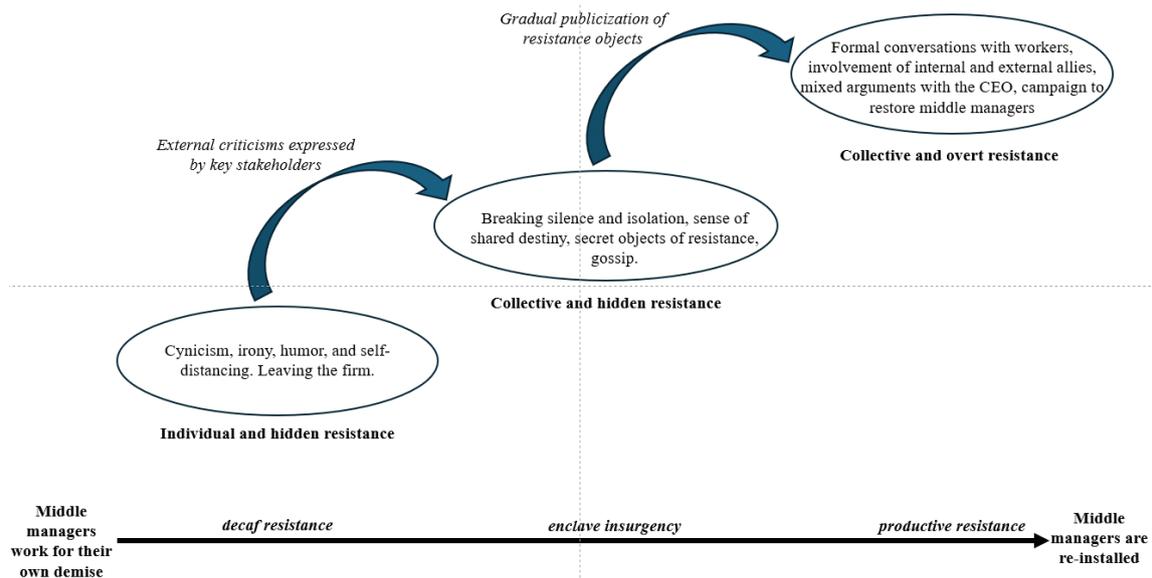


Figure 2. Middle managers' resistance escalation process during SMO transition.
Source: own elaboration.

develop knowledge on the transition between these two forms of collective resistance, which is particularly delicate, given that the actors involved expose themselves to sanctions and risks of social exclusion (Scott, 1990). Nevertheless, this kind of resistance is crucial for moving beyond 'decaf resistance' (Contu, 2008) and bringing about 'productive resistance' (Courpasson et al., 2021). Future research could draw on results from the social movement theory which has documented the elements likely to encourage collective and open forms of contestation: the ability to express a divergent opinion within the organization; the presence of internal and external allies and supporters with power over the organization; the repression capability of contested leaders; and, finally, the ability to implement concrete transformative actions (Daudigeos et al., 2020; Davis et al., 2008).

Conclusion

Considered at a macro-level, the emergence of SMO and other alternative forms of organizing (e.g., holacracy, spaghetti organizations, liberated companies) have been described as a development within contemporary capitalism to extract economic value through new regimes of control (for an overview see Foster et al., 2019). This implies a substantial change in the role of middle managers in capitalist organizations, traditionally considered to be agents aligned with owners and executives and rewarded for their capacity to put workers to work and implement top-down decisions (Tarakci et al., 2023). In this historical role, middle managers have been described as 'exploitative agents of capital' (Hales,

1999, p. 339) who are 'driven by instrumentalism' (March, 2003, p. 205). SMO and similar organizational experiments may destabilize these organizational and political roles for middle managers in their attempts to establish new regimes of control that function without managers (Barker, 1993; Lee & Edmondson, 2017). Indeed, SMO and post-bureaucratic organizational forms herald the disappearance of middle managers, described by Simon, the CEO of Yops, as 'relics of the past' and 'biodegradable'. It may be helpful to consider the struggles at Yops as the consequences of the 'betrayal' of corporate firms against one of their best historical allies (Courpasson et al., 2021; Foster et al., 2019). The reactions we observed at Yops can not only be considered as an expression of a rejection of new forms of organizational control *per se* but also as a factional resistance of middle managers who may have perceived that the new value regime of contemporary capitalism and its associated forms of control can function without them.

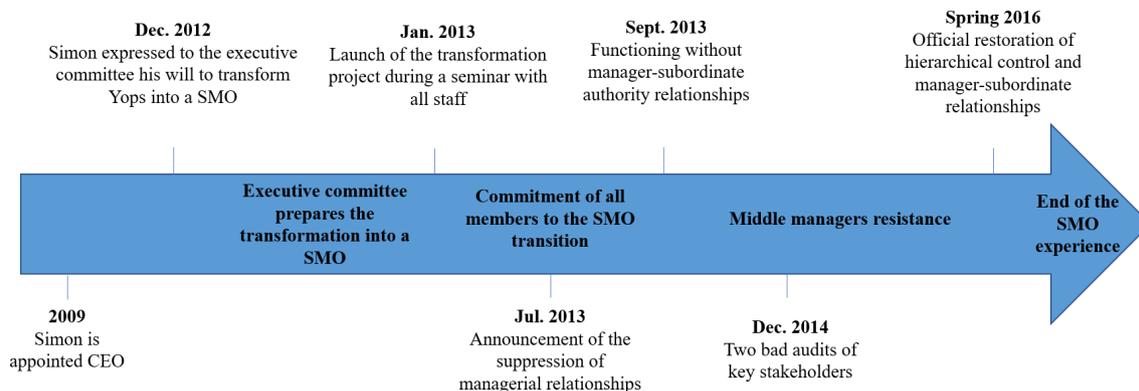
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Appendices



Appendix I. Timeline of events.
Source: own elaboration.

Appendix 2. Overview of the interviews

Interview	Pseudonym	Position	Recording/notes	Length (min.)
Period 1				
I.1	Simon	CEO	Recorded	77
I.2	Brice	Middle manager	Recorded	55
I.3	Camilla	Middle manager	Recorded	68
I.4	Frederic	Worker	Recorded	48
I.5	Gladys	Middle manager	Recorded	62
I.6	Peter	Worker	Recorded	66
I.7	Raymond	Middle manager	Recorded	51
I.8	Rosa	Middle manager	Recorded	53
<i>Total period 1</i>			<i>8 interviews</i>	<i>480 (8 h.)</i>
Period 2				
2.1	Simon	CEO	Recorded	104
2.2	Patrick	Worker	Recorded	72
2.3	Rosa	Middle manager	Recorded	75
2.4	Brice	Middle manager	Recorded	70
2.5	Frederic	Worker	Recorded	28
2.6	Liza	Worker	Recorded	49
2.7	Peter	Worker	Recorded	44
2.8	Anna-Maria	Worker	Recorded	53
2.9	Clara	Worker	Recorded	52
2.10	Raymond	Middle manager	Recorded	51
2.11	Steny	Worker	Recorded	22
2.12	Michel	Executive	Recorded	86
2.13	Mike	Worker	Recorded	54
<i>Total period 2</i>			<i>13 interviews</i>	<i>760 (12 h. 40)</i>
Period 3				
3.1	Simon	CEO	Recorded	104
3.2	Edouard	Middle manager	Recorded	72
3.3	Henry	Executive	Recorded	75
<i>Total period 3</i>			<i>3 interviews</i>	<i>251 (4 h. 11)</i>
Period 4				
4.1	Simon	CEO	Recorded	53
4.2	Liza	Worker	Recorded	46
4.3	Nicholas	Middle manager	Recorded	59
4.4	Mike	Worker	Recorded	29
4.5	Patrick	Worker	Recorded	41
4.6	Raymond	Middle manager	Recorded	63
4.7	Rosa	Middle manager	Recorded	19
4.8	Steny	Worker	Recorded	75
4.9	Brice	Middle manager	Notes	115
4.10	Nicholas	Middle manager	Notes	112
4.11	Allan	Middle manager	Notes	110
<i>Total period 4</i>			<i>11 interviews</i>	<i>722 (12 h. 02)</i>
Period 5				
5.1	Simon	CEO	Recorded	62
5.2	Nicholas	Middle manager	Recorded	59
<i>Total period 5</i>			<i>2 interviews</i>	<i>121 (2 h. 01)</i>
Period 6				
6.1	Simon	CEO	1 interview (not recorded)	120 (2 h.)
Total			38 interviews – 19 members	40 h. 54

Source: own elaboration.

Appendix 3. Uses of data sources

Source of data	Type of data	Analytical purpose
Interviews		
37 interviews with 19 members	Semi-structured individual interviews with Yops' members	<p>Understanding the context</p> <p>Knowing the role and occupation of Yops' employees and their evolution</p> <p>Knowing the evolution of the structure, culture, and process of the organization</p> <p>Capturing the opinions and representations of the members of Yops and their evolution</p> <p>Knowing activities and actions that sustain the SMO transition</p> <p>Understanding the perception of the SMO transition and its evolution</p> <p>Understanding the actions that aim to restore authority relationships and managerial control</p>
Secondary data		
9 sources (33 documents)	<p>Emails from Yops' members</p> <p>Website</p> <p>Communication documents and videos (e.g., conference and interview held by Simon, Yops' CEO)</p> <p>Press articles on the story of the firm</p> <p>Press interview of the CEO</p> <p>Radio documentary on Yops</p> <p>Internal documents: strategic plans, organization charts, internal and external communication documents, quality-control documents</p>	<p>Understanding the context</p> <p>Understanding material elements that contribute to maintaining the role of middle managers</p> <p>Knowing the opinions of actors</p> <p>Knowing the evolution of the structure, culture, and process of the organization</p> <p>Triangulating data and interpretations emerging from interviews</p>
Observation		
about 6 hours (notes)	<p>Circulating around workspaces and break rooms</p> <p>Informal conversations with employees of Yops</p>	<p>Understanding the context</p> <p>Understanding the transformation of material elements and <i>in situ</i> interactions</p> <p>Capturing the perception of the SMO transition and its evolution</p> <p>Knowing the actions that aim to restore authority relationships and managerial control</p>
Final interview with the CEO		
	<p>Discussion</p> <p>Presentation of a PowerPoint document by the CEO</p>	<p>Understanding the new organization of Yops: return of hierarchical control, executive committee, and monitoring system</p>

Source: own elaboration

Appendix 4. Supplementary coding illustrations

Paradoxical situation

Paradoxical roles

Helping to create autonomous teams while controlling work	<p>'He [the former middle manager] didn't touch the planning at all, nor the work schedule. We met and discussed how to handle it. He provided us with the visual plan and the tables for all the HR tasks. We adjusted along the way as the work progressed, or if there was an emergency [...] He kept an eye on things and corrected us occasionally'. (Anna-Maria, worker)</p> <p>'Before, I would have given him the directive [to repair the machine] directly. But this time, he came to me and said: 'Here's the issue we had, and I did this. However, we have another problem [with another machine], what do you think?' I told him what needed to be done, but honestly, even if he hadn't asked me, he would've handled it – and that was great'. (Brice, former middle manager)</p>
Solving interpersonal conflicts and sanctioning deviant behaviors without having formal authority	<p>Researcher: 'So why it wasn't her, the worker, who handled the conflict?'</p> <p>Respondent: 'She [the worker] could have addressed it yesterday because the outburst happened then, but she didn't say anything. [...] It was Raymond [a former middle manager] who delivered the message gently, saying that he tolerated everything except that kind of behavior, and that next time, there would be consequences'. (Rosa, former middle manager)</p> <p>'There's a bit of jealousy and tension [between three technicians from my former team] [...] There was a bit of a rough period that required quite a lot of discussion with one of them. I had to reach out directly to him to resolve the issue'. (Brice, former middle manager)</p>
Interfacing with external stakeholders without having managerial resources	<p>'Faced with the [client] audit disaster, I was powerless with no possibility of imposing the necessary corrections to catch up with the blow'. (Rosa, former middle manager)</p> <p>'When I read the [audit] report, honestly, I asked myself, 'How is this going to end?' Because I was no longer able to respond to the requests internally'. (Nicholas, former middle manager)</p>

Identity tensions

Having to develop and adopt new values that contradict middle managers' professional identity	<p>'You have to learn to trust [the workers], but it's not that easy to trust. Some [former middle managers], like Sandy [a former middle manager who resigned], controlled everything. She couldn't reinvent herself'. (Raymond, former middle manager)</p> <p>'For Sandy [a former middle manager], for example, in the quality control department, it was a real shock because she lost all her legitimacy. The team somewhat sidelined her; even though they weren't mean-spirited, but in a way, she found herself at a loss, unsure of what to do... She didn't know what to do anymore. And no legitimacy either, because she didn't even know how her technicians worked, and she couldn't contribute anything to them since she no longer had the authority of a manager through whom everything had to go. So, many decisions and changes were implemented by the team without her even knowing'. (Michel, former executive)</p>
Developing a sense of uselessness and feeling humiliation	<p>'So, I followed up, but ... how can I put it ... even if we can simplify our organization, it's unsettling for managers who have held their position for a while and have their own ways of working. It's unsettling'. (Edouard, former middle manager)</p> <p>'Earlier, we had a meeting, and they [the former middle managers] looked at me and said, 'What's going to happen to us?' The problem is that we're changing their job. Those who have the ability to adapt feel great about it, but those with fewer skills or less ability to bounce back say: 'But I only know how to do this. And now, I'm in trouble. I'm useless''. (Michel, former executive)</p>

External criticism

Middle managers faced external criticism

Two major stakeholders criticized the disappearance of hierarchical control through two bad audits reports	<p>'I understood the seriousness of the situation and that we were in a really bad shape because all the indicators and measures that they [the auditors] were requiring have disappeared. We have destroyed everything!' (Brice, former middle manager)</p> <p>'This audit didn't go as well as in previous years. It wasn't catastrophic either; since we still have production authorization. But they sounded the alarm'. (Liza, worker)</p>
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Middle managers' resistance

Individual hidden

Leaving the firm	<p>'We had two departures [at the production site], Sandy, who was at the quality control department, and Sam' (Henry, former executive)</p> <p>'[Among the former middle managers], a total of three have left'. (Simon, CEO)</p>
Distancing themselves from the firm	<p>'I experience [these changes] with a certain frustration because it was imposed, and until then I was responding to everything ... well ... I've taken a big step back from all that. I'm stepping back a lot from my professional activities. I'm a soccer team coach, and now that's where I'm investing my time'. (Raymond, former middle manager)</p>

(Continued)

Appendix 4 (Continued). Supplementary coding illustrations

Cynicism and humor	<p>'I joked to lighten things up because I still wasn't comfortable after the announcement about the removal of the managers'. (Edouard, former middle manager)</p> <p>'You're made to feel that what you've been doing for 10 years is useless and causes more problems than anything else ... in terms of management, we've really hit the top level!' (Raymond, former middle manager)</p>
<i>Collective hidden</i>	
Informal discussion between former middle managers to share criticisms regarding the disappearance of managerial control	<p>'The audit reports were discussed here and there among us [former middle managers]. Our diagnosis was simply that we were forgetting about the client!' (Raymond, former middle manager)</p> <p>'I talked a lot with Rosa about why it [managerial control] was necessary. [...] Liberated company or not, that's how we have to work. We need traceability'. (Nicholas, former middle manager)</p>
Spread alarming rumor of audit reports to workers (gossip)	<p>'I've been very clear with the teams: the audits were very bad. When we are asked to be accountable, and we aren't able, this is what happens: we put the company in danger!' (Nicholas, former middle manager)</p> <p>'She [a former middle manager] talked about 'threat'. She said something like that: 'We're going to lose our accreditations, we're going to close down, and we are going to lose our jobs!'. (Patrick, worker)</p>
Secretly rebuild indicators, monitoring documents and a performance review	<p>'We discreetly crafted and pieced together a few indicators. Not a lot, but important things'. (Raymond, former middle manager)</p> <p>'The idea of reviving these indicators was to have the essential information that must be there to monitor'. (Brice, former middle manager)</p>
<i>Collective public</i>	
Organizing a formal meeting with all former middle managers to officially assess the difficulties generated by the disappearance of managerial control	<p>'The meeting was useful because we needed to discuss things together [with all former middle managers]. There were informal discussions all over the place. But this was an opportunity to officially share things'. (Nicholas, former middle manager)</p> <p>'They got together [former middle managers]. They said to themselves: we thought we were good, but in the end, we're no longer passing the audits'. (Simon, CEO)</p>
Formalizing a shared criticism on the disappearance of managerial control	<p>'The analysis that we shared concerning the liberation of Yops was the following: what a business leader is looking for is obviously performance. Autonomy of teams can be a source of performance, but in the food industry, this cannot be done at the expense of quality control'. (Raymond, former middle manager)</p>
Crafting arguments that defend the usefulness of managerial control and the role of middle managers	<p>'We agreed that the verbiage of quality should not be used with the teams. I told the others [former middle managers]: we have to be more pedagogical. We must not justify this because it is requested by the authorities. No. The real reason why you have to trace is that if there is a problem, it's interesting to know where something happened. If there is a death among consumers, we have to justify it. Managers have to bring quality back to a real practical notion'. (Nicholas, former middle manager)</p> <p>'During this meeting [between former middle managers], we agreed on a common vision: human beings need a leader. But a leader in the good sense of the word, that is, someone who is able to listen. This is an important framework for making people feel more comfortable and autonomous in their work'. (Allan, former middle manager)</p>
Bargain campaigns to restore managerial control with workers and the CEO	<p>'What she [our former middle manager] said to our team was that: compared to the people working on the shop floor, managers have a broader perspective. For example, regarding the modifications to the workshop that will have to be done after the last audit. We are completely immersed in it and that's why it's difficult for us to see what needs to be done to meet the standards'. (Patrick, worker)</p> <p>'I told him [the CEO]: 'Obviously the technicians know that in our industry it's important to be able to explain their intervention'. But what I explained was that they are not able to translate what happened, the nature of the interventions on the machines. They need translators and we [middle managers] are these translators'. (Allan, former middle manager)</p>

SMO transition reversed

Return of hierarchical control and manager-subordinate authority relationships

Reappraisal, reconceptualization of the role of middle managers by the CEO	<p>'We talked about it a lot with Rosa and Nicholas [two former middle managers]. They are really mad at me because I broke things and now they were sometimes in the position of having to negotiate things with workers whereas they should be in the position of saying: 'Wait! what needs to be done is clear: You have to do that. There are holes in the racket so now it's gonna be like this and like this'. (Simon, CEO)</p>
Middle managers are renamed leaders and facilitators	<p>'The mistake I made was removing the hierarchy [...] We reintroduced managers that we now call 'leaders' and 'facilitators''. (Simon CEO)</p>
Executive committee is recreated	<p>'It's a mistake to think that all operational staff can do strategy. We reinstated a strategic committee that brings together the leaders'. (Simon CEO)</p>

(Continued)

Appendix 4 (Continued). Supplementary coding illustrations

Enforcement of a new organizational design based on hierarchical relationships	<p>'Today, the final say is at the top [at the hierarchy level]. That wasn't the case before'. (Steny, worker)</p> <p>'We've returned to a system where managers are accountable for the actions of their subordinates and their work. I'm more present in what they do. When they've taken an action, I take the time to go and see them and ask: 'What did you do? What happened? How did it go?' And it's easier for me to understand what happened. I had stopped doing that'. (Allan, former middle manager)</p>
<i>Recentralization of monitoring and reporting systems</i>	
Recentralization of the quality control process under the responsibility of middle managers	<p>'What we have put back in place is to legitimize the quality activity of managers. The impact and importance of managers' control activity. With an educational effort where we make sure that people communicate, talk to each other. Tell people that we [managers] are here to ask for additional information, because when you're in the thick of it you can't necessarily see everything'. (Nicholas, former middle manager)</p> <p>'That's where we take a bit of a step back, because after that, it's a manager who comes in and says there was an issue at this level. In the end, it's the managers who are managing performance and quality'. (Liza, worker)</p>
Development of new monitoring tools and mandatory management procedures	<p>'We [the re-legitimized middle managers] not only rebuilt the basic indicators, those that are essential, but we also developed indicators that did not exist before. We plan to do collaborative work with the teams to build together the indicators that they themselves identify as relevant'. (Nicholas, former middle manager)</p> <p>'We're going to reintroduce quality indicators that will allow us to integrate these objectives into our work. In each department, people will identify the most useful indicators to track their progress, in addition to the mandatory indicators, because that's what management requires to have its own vision of the plant's proper functioning'. (Liza, worker)</p>
The reinstatement of managerial control generates mixed feelings among workers	<p>'Two years ago, we were all about giving more power and responsibility to the workshops, and now it's all going backward. Any procedure I submit, the manager wants to read it, validate it, check every single word, every accent, every little thing...! It's pffff [deep sigh]'. (Steny, worker)</p> <p>'We're going to cut a position in the workshop. To make that announcement, the guys are glad there's a manager. They say: "Oh no, I don't want to do that! [announce to someone that his position is being cut]". (Patrick, worker)</p>

Source: own elaboration