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ORGANIZATIONAL STUDIES IN LATIN AMERICA: TOWARD AN INVESTIGATION AGENDA

This paper theoretically reflects on the direction of Organizational Studies (OS) in Latin America and presents an investigation agenda to meet the needs and particularities of our region. In this regard, the need to avoid importation of conceptual models and solve the historical tension in the Administration field has emerged in the Western world. The paradigmatic break that arose in OS during the 1960s had its regional correlate in the last years. This led to a real investigation program that shows promising signs of vitality in Latin-American OS and a strong process of institutionalization of their own paradigm.

INTRODUCTION

As a consequence of the discovery of the Americas, stories, practices, and existing knowledge on the continent were, to a large extent, ignored and even attacked by European conquerors. Thus, it could be argued that the Americas are the manifestation of a European colonial power that, since the great discoveries, expanded their territories and their “modernization” across the world. With the “discovery,” the American continent began administration from the perspective of the European metropolis and for their own benefit. The process of colonization disrupted the local knowledge and transformed the surroundings of these societies. Their “native” organizations of the time were subject to and controlled by European metropolises (Mignolo, 2008). From this moment on, a vision of inferiority and underdevelopment of local societies has emerged (Aparicio, Silverman & Aparicio 1997). Discursive forms of control have been systematically produced as an effective means of subjugating native peoples. These practices denied them the right to enjoy the same living conditions that those social groups in power enjoyed. All this occurred in a discursive context of civilizing significance.

In this context, the idea of Latin America emerges as a discursive construction, apparently inferior to Europe and its colonies. Thus, the difficulty associated with production of knowledge originating in central countries is inherent. Even though there are proposals for adaptation of knowledge generated in Europe, the United States, and Latin-American countries (for example, Ramos, 1958), it is difficult to defend decolonization epistemology (Mignolo, 2011).

Thus, to think about the evolution of Organizational Studies (hereinafter OS) in Latin America requires understanding of the emergence and development of capitalism in Latin America against Europe and the United States, places where the management of the so-called OS was originally conceptualized.

This is necessary because in contrast to cattle-raising from Europe and North America, Latin American industrial capitalism does not arise as an endogenous response to liberal political and economic breaks. It is imported and implanted in a context that is not precisely liberal, at a time when agricultural and cattle-raising political and economic models prevailed, with a deep-rooted oligarchic system and conducted by traditional landowner elites.

Under this incipient Latin-American capitalism, the organizations that arise are a special hybrid, rife with paradoxes and contradictions, many of which are radically opposed to the rational conceptions of liberalism regarding politics, economy, science, and society. Hybridization forms the foundation of these organizations, which in practice mixes religion (Catholic), state, and market. Nevertheless, the concepts of individual and liberal freedom operate simultaneously with the intense collectivist tradition of dependence on conservative elites.

These organizations, therefore, did not work as mechanisms for economic structuring under market laws, of mass production for the consumer population, but were developed as an extension of the elites' power under the state's tutelage, developing client-based relations to maintain monopolies and market privileges. Likewise, the management applies traditional a hierarchy and direction mechanisms, extracted from the landowner practice between village chiefs and peasants, mixed with managerial elements.

Under these criteria, rather than organizations focused on efficiency and productivity, organizations show profiles of strong bureaucratic and client-based system. They are closer to state models than to modern industrial organizations that began consolidation after the war in North America or in Europe after the Second Industrial Revolution.

This initial context serves to centralize the idea that the analysis approach of organizations in Latin America, at least in the beginning, shows an object of study that is not seen in Europe or North America. Although the development of "Organizational Studies" in the region is effectively without intellectual significance (Ibarra-Colado, 2008), the occupations explored are focused on the reproduction of Western managerial models. The intention is to ensure their implementation in Latin American organizations. In contrast, there is a focus on more critical developments that reflect recurring approaches from

political and sociological theory, with emphasis on social and economic systems, without insisting on systematic observation methods.

Our intention is to construct an agenda for OS investigation, considering the signs of structural change observed in our region, where the Ibarra-Colado thesis was alive before popular demonstrations occurred in Ecuador, Bolivia, Chile, and Colombia, in a context of crisis in state organizations, with a focus on the role that market organizations play.

PRODUCTION OF KNOWLEDGE ON ORGANIZATIONS IN LATIN AMERICA: GENESIS AND EXPLANATORY FACTORS FOR ITS COURSE

We can analyze the knowledge production around the organizational phenomenon according to different structural causes that affected the investigation agenda of different countries in the region. One of the factors that help explain this phenomenon is the center-periphery dynamics (Engwall, 1996; Gantman, 1994, 2002; Ibarra-Colado, 2007). The geopolitical position of Latin America against economically developed countries of the Western world implied that the genesis of organizational knowledge centered almost exclusively on the orthodox aspects of Administration. This is because the primary concern of firms established in the region's countries, through the lens of proto-industrialization processes, was the solution to issues regarding the adaptation of organizational management to local market regulations (Szlechter, 2013).

Thus, Latin-American "underdevelopment" can be explained by the public that utilized the administrative knowledge produced in university institutions: managers of large firms and the so-called management industry (Luci, 2016), including consultant companies. This resulted in development with limited autonomy and an inclination to satisfy companies' demands. A curious fact that illustrates this trend is the creation of Business Administration undergraduate courses in Argentinian universities in 1958, when the country was preparing to receive direct foreign investments in key sectors of the economy under the condition of incorporating local suppliers in the production process (Szlechter, 2013).

In short, the difficulties faced by OS in the region are due to the center-periphery dynamics that led to a lack of autonomy in local production, at least during the first half of the 20th century, which led to an almost undifferentiated use

of classical and orthodox Administration, a tributary of Western management. Despite the existence of organizational forms in the region since early civilizations and the analyses on industrial organizations in Latin America since the 1920s (Hoyo, 1922; Palacios, 1922), we must question how consistently OS were developed in the region.

For Ibarra-Colado (2006b), OS lacked relevance in Latin America and their absence in the academy limited our understanding of organizations' problems and functionality in the region.

We can add the limitations to the organizations' own hegemonic sense that does not consider the organizational dimensions of social life (Carrieri, 2014), which are diverse and specific to Latin-America. Ibarra-Colado (2006b) indicated a trend in Latin American social thought that supported analysis from the general issues of Economy and Politics, to that focused on dependence and subordination of the region to central countries. Therefore, organizational knowledge developed in a subordinate context around the central countries (Ibarra-Colado, 2006a). It is evident that contexts very different from those of classical liberalism generated the processes of industrialization and organizational formalization in many Latin-American countries. These theorize and explain the birth of market and corporate organizations, including civil society organizations.

However, we cannot approach the production of academic knowledge in terms of structural determinants alone. There is also a sort of "agency capacity" of investigation centers in the region that assist in offering a more comprehensive perspective of this process. This is how, along with the contributions of structural analyses, constructivist visions can contribute to critical analysis on how OS developed in Latin America.

The reproduction of hegemonic design and organizational management forms had its main exponents in university think tanks and gurus of the management industry. This biased their view of market rationality to offer solutions to problems emerging in organizational life, both in private and public ambits, NGOs, and social and solidary economy. Ibarra-Colado (2006a) proposed an alternative view of the center–periphery dynamics to explain the conceptual direction of the "organization" concept in the region. Upon a process called "falsification" by the author, we can explain how organizational knowledge, from the centers of world economic power, was automatically sidelined in order to offer "prêt-à-porter" technical solutions to problems of the organizational world, disregarding social and political concerns.

The notion of "falsification" implies that the economic power asymmetry among developed and underdeveloped nations becomes invisible, since the recipe to deal with

organizational weaknesses are approached exclusively from the perspective of ideal structural designs and efficient processes that improve productivity. Inside this phenomenon, production of academic literature and divulgation was used to explain frames that reproduced "hegemonic forms of knowledge, legitimate because of their so-called 'scientific validation'." (Ibarra-Colado, 2006a, p. 470). The main consequence of the lack of autonomous native perspective was the "weakening of the Latin American critical thought" (Ibarra-Colado, 2006a, p. 472).

We must also consider that this lack of autonomous native perspective involves the structure of those that have historically produced knowledge in the field of management in Latin America. In a macro analysis on the center–periphery relation, we consider geopolitically those that produce from a Latin American context. However, it is important to note that internally, those that theorize on management and OS in Latin America are groups integral to their country, since in socially unequal contexts they have always produced knowledge. While accessing Latin-American universities, they are groups with Eurocentric profiles, mostly male, not black, not indigenous, putting aside a peculiar dynamic of their own original contexts. Therefore, included in the Latin American context, hegemonies characteristic of the same logic that constituted Latin America as periphery reproduce. So, it is a world periphery that is also regional.

One example of this process is the importation of recipes on business management from countries central to world economic power which historically, did not consider the organizations of a Latin American social context. Likewise, they did not consider organizational and social minorities or management of diversity. The critical knowledge produced on OS on the theme, reflected in Latin American company practices, is based on the functionalist idea that diversity management is only considered a competitive advantage (Alves & Galeão-Silva, 2004) and not a bond between the company and its social context. This process contradicts the genesis of structural inequalities instituted in Latin American countries from the colonialist power dynamics. Thus, management practices destined to fight inequalities like gender, race, class, ethnic origin, and sexuality produce limited results.

ADMINISTRATION, MANAGEMENT, AND THEIR TENSE RELATION WITH OSS

The persistence of views that emphasized technical aspects rather than wider social processes in the internal dynamics

of different organizational configurations becomes clearer if the apparent scientific method is analyzed with an ideological concept (Gantman, 1994). In this regard, the “serpent’s egg” of the dawn of theoretical developments of OS lies in certain management sciences and administration. Some authors have even indicated that there is scarce differentiation between the two subjects (Wood & Kelly, 1978). The literature has approached management problems with regard to ideology, as it helps build the social reality of market rationality. It is contradictory that this “spurious” origin of OS later constituted the reason for abandonment of classic postulates of Administration.

The ideological analysis of Administration has a long tradition (Bendix, 1966). Gantman (1994) states that implications of this bias are not limited to solving problems or prescription of action models. Add to that the discourse analyses of management, which enlightened the intention of creating a social reality whose material sustenance are in a “particular historical structure of social privilege” (p. 8). Thus, managerial ideologies achieved a legitimating effect while offering action courses to different organizational environments.

According to Ibarra-Colado (2006b), the limited differentiation between OS and Administration is due to an inability to provide clarity on the term “organization,” a matter that still persists. The lack of historicization of this concept, along with the absence of situated analyses, helped build the capitalist mercantile rationality on the program planning of exclusive intelligibility when defining reference parameters of the organization. The abstract use of the term “organization” had an effect in its characterization as grey science or minor knowledge (Rose, 1993), since the fundamental function was to solve practical problems (offering “one best way”), rather than seeking some “truth.” According to Ibarra-Colado (2006b, pp. 128–129), the ambiguity of the “organization” concept had two main effects. On one hand, it made possible the replacement of terms with strong negative connotations like corporation, monopoly, or bureaucracy. In this regard, the bad press of Latin American state machinery, characterized by deficiently meeting social demands and the democratic processes permanently ruined by military dictatorships, distinguished bureaucracy in terms of inefficacy, inefficiency and corruption. On the other hand, corporate action in the region, characterized by profusion of monopolies that hindered more harmonious capitalist development, generated distrust of the terms monopoly and corporation. That had a positive effect in the later development of OS in Latin America when, while producing a kind of paradigmatic break in Administration, there was an attempt to shed the label of servant, leading to a more

autonomous deployment and with increased neutrality in the academic production, as will be seen later.

It is necessary to insist that the abstract and general use of the term organization helps explain the positivist origin of knowledge production on the organizational phenomenon (Ibarra-Colado, 2006b, pp. 128–129). That caused analyses of such different configurations as NGOs, hospitals, schools, sports associations, churches, or political parties fall under the same paradigm, making comparable realities of very different natures. The same goes for nontraditional organizations derived from survival strategies of socially disadvantaged groups in unequal contexts, like informal businesses (Barros & Carrieri, 2015), often located in public places. Thus, the approach of experts focused on proposing appropriate structural designs according to the ideal types originated in the rationality of private companies.

The positivist bias of the study of organizations had a considerable impact on the emergence of OSs. Many of its precursors left the Administration rows, which not only undermined its autonomy but also saw their theories represent “the institutionalization of successful solutions achieved while facing different problems in different ambits, like work, management, markets, technology, environment, politics, just to mention the most relevant” (Ibarra-Colado, 2006b, p. 135). The relevance given to the production of “recipes” limited autonomous discourse on the development of theories to denature management assumptions. The confusion involving Administration and OS led to indications of an apparent “intellectual schizophrenia” (Reed, 1985: 21, quoted by Ibarra-Colado, 2006b). On the basis of Reed (1985), Ibarra-Colado (2006b) suggests that OS are stuck in a permanent tension between the “normative order that prescribes organizational knowledge and the realities that deny them all the time” (p. 135). The schizophrenic character is based on, on one hand, the OS’ intention of expressing conflict in the organizational social reality, and, on the other, intention to normatively prescribe the rules that channel such conflicts. In a sense, the accusation of Administration being more technical than science ended up replicating against the OSs.

In the Western world, the functionalist origin of OS has suffered a rupture since the 1960s. It is at this moment that this subject burst into the Latin American context (Ibarra-Colado, 2006b, p. 143). Transformations in the social reality that occurred in the USA, Europe, and Latin America highlighted a reconsideration of the object of study of OSs. The structuralist perspective of the organizational phenomenon had influenced the subject in the 1920s and 1960s. This implied that the chief concerns were the analysis

of organizational structures in performative terms: that is, only according to the set purposes. This perspective enters a crisis after the boom of constructivism, hermeneutics, and radical humanism. Thus, the study of organizations shifted its view to social studies, meeting the social consequences of organizational life (Ibarra-Colado, 2006b). The organization conception of rule under the power of its leaders toward the consideration of social and economic conditions that pervade the organizational life. This implied a turning point for OSs, which became concerned with offering explanations to social phenomena inside organizations (Ibarra-Colado, 1990, p. 12). Let us analyze deeper this paradigmatic break.

THE PARADIGMATIC BREAKING OF OS AGAINST ADMINISTRATION AND MANAGEMENT

The 1960s was a pivotal decade when the paths of Administration and OS started to diverge. The tense relation between the two resolved from the moment OS converted to the theoretical consciousness of Administration (Ibarra-Colado, 1990: 70). In a process of distancing from positivist postulates, OS discarded the insistence in each progress in the production of scientific knowledge that characterized the mainstream lines of Administration. The succession of discoveries of new “one best way” to manage organizations led to the blind belief in the development of increasingly more effective techniques to improve organizational performance.

During the 1960s, OS were able to undermine rationality as the ultimate assumption that formed the basis of Administration studies (Nogueira, 1993). Appealing to post-structuralist analyses, OS took their position from postures as performance was not part of their analysis. Authors like Fournier and Grey (2000) address anti-performative theses, indicating that classic administrative thought was based on the search for appropriate means to obtain efficiency and productivity. Instead, the OS are a subject with an inherent reflexive character, while questioning the epistemological and ontological assumptions of traditional Administration (Gantman, 2017, p. 6).

Currently, OS face the challenge of interpreting management as social practice, meeting the consequences of organizational design. If classic Administration coincided with bureaucratic and mercantile rationality, OS should incorporate different action grammars, like community and solidarity (Ibarra-Colado, 2006b). In other words, it is about seeking to study

the organizational phenomenon and its social effects as well as social impacts on organizational life. We must study which were the main lines of questioning that emerged from the paradigmatic break of OS regarding Administration. Some of the lines traced in the region contemplate approximations inside the previously suggested point of view:

1. A perspective of normative cut focused on state models analyzed inside the classic Weberian bureaucratic line, which mixes elements of law and public administration.
2. A work line well explored about organizational themes linked to development, particularly in the ambit of international NGOs and state institutions. These works originate from the technical literature of international development organizations (NGOs) and multilateral organisms during the 1970s, as part of intervention processes and assistance to the region countries. These organizations were significant in many places given the volume of their resources and influence through their organizational management and the projects they carried out. Inside this theme, with distinct ideological orientations, we can place the organizational literature developed later by entities like CEPAL, oriented to the strengthening of local organizations and governments, with an economic focus. Likewise we can connect the literature of the New Public Management introduced by multilateral organisms and the academy as of the 1990s, focused on demonstrating the inefficiency of public organizations and the well-being model, and the need to re-orient them toward the models of efficiency and results promoted by neoliberal theories with state cuts. That included approaches that legitimated the new born concept of the third sector that claimed efficiency and promotion of society participation through the so-called civil society organizations and their representation in local NGOs, now reconverted into mechanisms for public policies execution, under an eminently neo-institutional focus.
3. A multidisciplinary perspective to address Administration studies in Latin America, grounded on the need to understand the region and develop its own organizations and administrative models, without becoming dependent on Western models. These works, which questioned the idea of Administration as science, and joined efforts from Latin American scholars with the so-called Montreal school, defended the need to place the individual at the

center of organizational concerns. This required the study of human beings in their biological, psychic, and social dimensions and fight the behaviorist approach prevailing in organizations and the classic management (Echeverry, Chanlat, & Dávila, 1992).

4. A sociological perspective based on Ramos (1958, 1983) about instrumental rationality in classical management, which seeks to stay away from the functionalist conception of organization and overcome the sociological reduction appealing to a critical consciousness in Latin America.
5. An anthropological perspective of industry and productive organizations, very incipient and diffuse, represented by Guigo's impactful works (1994) on Argentine companies during the 1980s published in France. Today local works stem from Latin American authors in a very eclectic perspective marked by Western classical studies on organizational culture.
6. A perspective, developed during the 1980s and 1990s, based on the study of social movements in Brazil, opposed to the prevailing lines in Brazilian OSs, supported a critical tradition of OS that preceded even the central countries (Misoczky, Flores y Goulart, 2015). The lessons left by this study on organizational forms focused on environmental protection and helped the deployment of proposals of organization from social fights that required a new conceptual set to understand OS from an alternative view.
7. Studies on business history in Latin America that comprise a varied line of work where biographies, history of business development in general, and of companies in particular in the countries are mixed, with strong influence from the historiographic method in some cases and sociological analysis in others. Within these works it is worth mentioning the efforts to characterize companies' impact on the countries' regional culture (for example, the textile sector on certain peoples in Colombia) (Arango, 1991) (Dávila, 2003).

CONCLUSION

Without disregarding the influence of societal structures and processes that affect the transformation of organizational

realities, we must investigate the mutual interdependence of internal and external organizational borders. According to Rodríguez (2007), we must incorporate in debates the social studies on organizational management. For him, the need to territorialize OS started to bear fruit with some works that aim to view our reality with "Latin American eyes," such as that by Szlechter (2018), who attempts to deconstruct the "official and hegemonic" history of debates on the organizational phenomenon in Argentina, responding to developments of organizational forms without omitting the incorporation of conceptual schemes from Europe and the United States in the frame of geopolitical and economic power relations. Similarly, several attempts to consider the knowledge on organization have appeared in American countries with critical and autonomous orientation (Misoczky, 2017; Paula, Maranhão, Barreto, & Klechen, 2010), while also being de-colonial (Faria, 2013). Despite these efforts, most of the regional literature contains this generic type of analysis on the organizational knowledge in Latin America, which ignores the specific characteristics of each country in the region (González-Miranda, Ocampo-Salazar, & Gentilin, 2018). For example, the knowledge on organizations and management in Argentina differs from Brazil (Gantman & Rodrigues, 2008), where there is certainly a large community organized in the field of OS (Crubelate, 2005; Rodrigues & Carrieri, 2001).

Any study that intends to show a de-colonial and liberating perspective of organizational social reality must certainly include analysis with a reflexive view to better understand the mindset of those that, at the time, held power in organizations. Thus, the perspective of those made invisible must consider, even where it diverts from performative analyses, where organizational efficacy is the "sacred" variable. Likewise, analyses on invisibilities must be comprehensive, and not just from the homogenizing point of view of colonialism in Latin America (Berth, 2018), to understand the reproduction of race, gender, and ethnic categories (Cardoso, 2014; González & Hasenbalg, 1982). These reflect the discourse reproduction in the occupation processes of organizational spaces, in reference to a hegemonic and white male management (Carrieri, Diniz, Souza, & Menezes, 2013). Therefore, it is necessary to expand reflection on places of speech and discourse analyses (Ribeiro, 2018) produced from the colonialism of knowledge and power.

On the other hand, it is necessary to put aside analyses on problems that seem to originate from a "cabbage" and have been shown in an ahistorical and abstract manner. If at some time there was a special interest in studying the organizational culture of large companies from developed countries, it was not due to researchers from large North American schools, but due

to large restructuring (mergers, acquisitions, re-engineering) in the 1970s and 1980s, which implied that employees had to adapt to company cultures that acquired stock packages from other companies. In turn, we must understand the impact of job markets' regulations to explain the changes in work organization. We cannot discuss lean production and work in red with new organizational configurations without explaining the work deregulation processes that our countries suffered from the break with neoliberal economic models. At last, a perspective that intends to be reflectively critical, de-colonial, and liberating cannot be restricted to merely a denouncer attitude of the capitalist reality that negatively affects our organizations. If capitalism, in all its historical development phases, needed to appeal to the common good to gain legitimacy (Boltanski & Chiapello, 2002), the development of studies is imperative to call for the search of organizational forms and configurations. These objectives are not centered in the instrumental reason and in individualistic forms of socialization but in liberating projects that support the construction of social bonds and actions that arise from collective projects.

To conclude, it is important to note that local or autonomous agendas of OS in Latin America have always been influenced by external factors and that is why it is necessary to review their organizational impact on the region. Within these external factors we can identify two that are relevant: 1) The end of globalization and the consequent emergence of a liberal agenda with the construction of economic blocks before the emergence of commercial barriers, as in the case of Brexit. 2) The emergence of left and right populism, with their differences and nuances on the world stage, put in check the neoliberalism as we know it and whose transition and defense began in Latin America by the extreme right-wing, specifically in Chile, Bolivia and Ecuador. Therefore, we consider it necessary to propose an agenda for OS appropriate to the region, extending an invitation to integrate a real program of research among researchers on OS in the region. In this regard, Dussel and Ibarra-Colado's (2006) lines of analysis on globalization and the impact on organizations should be rewritten.

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AUTHORS' CONTRIBUTIONS

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