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ORGANIZATIONAL STUDIES IN LATIN AMERICA: BACK TO THE ROUGH GROUND!

Estudos organizacionais na América Latina: De volta ao terreno áspero!

Los estudios organizacionales en Latinoamérica: ¡Vuelta al terreno áspero!

ABSTRACT

The aim of this paper is to do a self-critical retrospection exercise about what Organizational Studies (OS) are within the Latin American context. Their development and incidence in the region have increased and consolidated --although not in all countries at the same level and extent --as a critical field of knowledge to study organizations. However, there are some unresolved matters that need to be addressed and discussed; that is why Wittgenstein's (1986) expression is retaken to formulate some fundamental questions regarding the OS identity and projection in the region, in search of a "friction" that gives continuity to that path of growth. In addition, some constitutive aspects of OS are discussed. Reflections will allow organization experts and researchers not only to delve into this field of knowledge, but also to build a stance of their own on OS in the region.

KEYWORDS | Critical approach, field of knowledge, Latin America, Organizational studies, organizations.

RESUMO

O objetivo deste artigo é realizar um exercício de retrospectiva autocrítica sobre o que são os Estudos Organizacionais (EO) no contexto latino-americano. Seu desenvolvimento e incidência na região vem crescendo e se consolidou -embora não em todos os países no mesmo nível e profundidade- como um campo de conhecimento crítico para o estudo das organizações. No entanto, existem alguns assuntos não resolvidos que precisam ser discutidos e apresentar debate. Assim, a expressão de Wittgenstein (1986) é retomada para formular algumas questões fundamentais em relação à sua identidade e projeção em busca de uma "fricção" que permita continuar nesse caminho de crescimento. Além do acima exposto, alguns aspectos constitutivos dos EOs são discutidos. As reflexões não apenas aprofundarão esse campo de conhecimento, mas ajudarão os pesquisadores e estudiosos das organizações a construir sua própria posição sobre os EO na região.

PALAVRAS-CHAVE | Aproximação crítica, campo do conhecimento, América Latina, Estudos Organizacionais, organizações.

RESUMEN

Este artículo tiene como objetivo realizar un ejercicio de retrospectiva autocrítica sobre los Estudios Organizacionales (EO) enmarcados en el contexto latinoamericano. Su desarrollo e incidencia en la región ha crecido y se ha consolidado -aunque no en todos los países al mismo nivel y profundidad - como un campo de conocimiento crítico para el estudio de las organizaciones. No obstante, hay algunos asuntos aún sin resolver sobre los cuales es necesario debatir. Es así como se retoma la expresión de Wittgenstein para formular algunas preguntas fundamentales, en relación con su identidad y proyección, en busca de una "fricción" que permita seguir por ese camino de crecimiento. Aunado a lo anterior, se discuten algunos aspectos constitutivos de los Estudios Organizacionales. Las reflexiones permitirán, no solo ahondar en este campo de conocimiento sino, también, contribuir con los investigadores y estudiosos de las organizaciones en la región a construir una posición propia sobre el asunto.

PALABRAS CLAVE | Aproximación crítica, Campo de conocimiento, Latinoamérica, Estudios organizacionales, organizaciones.

DIEGO RENÉ GONZALES-MIRANDA¹

dgonzal8@eafit.edu.co

ORCID: 0000-0003-1211-0656

¹Universidad EAFIT, Department of Organization and Management, Medellín, Colombia

INTRODUCTION

The development of Organizational Studies (OS) in Latin America has had an important deployment in recent years. Research projects, doctoral theses, empirical works, events, and other academic and research activities express not only the proliferation of this field of knowledge, but also the interest of many scholars who approach this domain to learn and apply their theoretical and methodological proposals in the search for alternative approaches to analyze the social phenomena that occur in organizations (Albuquerque, 2017; Camara, 2017; Ibarra-Colado, 1991, 2006a; and Pérez & Guzman, 2015, among others).

For Ibarra-Colado (2003), OSs emerge as a field of study that aims at overcoming or toning down the positivist and reductionist imperatives imposed by both organization theory (OT) and administrative theory (AT). It is a space of particular knowledge that contrasts with theories that enjoy greater institutional recognition. Proof of this is that said field of knowledge does not intend to become a great theory, but seeks to delve into the knowledge of a specific organizational reality, based on its analysis from the perspective of social sciences (SSs) and with a critical-comprehensive stance (Gonzales-Miranda, 2014; Padilla, Hernández, & Ríos, 2015). Thus, OSs advocate, from a postmodern perspective, the emancipation of human beings (Alvesson & Deetz, 2017; Pfeffer, 2000), with the purpose of distancing themselves from the social rationality of modernity, albeit without proposing something concrete (Alvesson & Deetz, 2017; Barba, 2012; Hatch, 1997; Montañó, 1994; Reed, 1993).

Notwithstanding the benefits and the important results in terms of publications, it is crucial to perform a retrospective exercise, that is, to retrace the steps that look for clarification regarding the foundations, but, especially to consider some questions that have been taken for granted but have not yet been resolved. As Ibarra-Colado (2006a) states, “Unfortunately, there are not enough studies in Latin America that enable the interpretation of the social consequences of organizational performance and management” (p. 91). In this sense, the purpose of this paper is to bring to the table some topics that have not been sufficiently addressed regarding the development of OSs in the region. Given that OSs in Latin America are still in development, literature by classical and Latin American authors is used to illustrate, strengthen, and foster reflection. This will favor the emergence of new challenges and questions, the discovery of possible research routes, and the introduction of new conversations on what OSs are in this part of the world.

Back to the rough ground!

To start the journey, it is worth referring to Robert Chia’s words at the 31st colloquium of the *European Group of Organizational Studies (EGOS) 2015*, who, quoting Wittgenstein, said:

The conflict becomes intolerable; the requirement is now in danger of becoming vacuous. We have got onto slippery ice where there is no friction and so in a certain sense the conditions are ideal, but also, just because of that, we are unable to walk. We want to walk: so we need friction. Back to the rough ground! (Wittgenstein, 1986, p. 121).

Thus, Chia (2015), in that colloquium, invited a return to the comprehension of the everyday aspects of reality. These, surrounded by the complexity of life, provide light for a deep understanding, and avoid pre-established interpretations that pigeonhole reality and, in turn, favor the proliferation of theories that, besides not helping to explain, become the object of study itself. Therefore, the search for (or the achievement of) a theory should become the goal of all research study—not the understanding of reality and the hidden avatars of its daily functioning. For this reason, the author invites scholars to go back to the rough ground, as a way of looking at the road already travelled and of returning to the fundamentals.

What, then, are the meanings and implications of going back to the rough ground? It certainly means looking for friction, which can also be defined as resistance to motion, but here it is metaphorically understood in the opposite way, that is, as a force between two surfaces that prevents them from sliding or slipping on each other. It is the same force that allows acceleration, since it becomes a foothold that prevents slipping and makes it possible to move forward. Going back to this expression is essentially an invitation to consider two aspects.

On the one hand, it encourages all those scholars studying organizations not to get carried away by the inertia and comfort of a path already built, where it is easier to slip, but it is more difficult to advance. Taking for granted a series of assumptions about OSs, without delving into a discussion that sheds light on the Latin American scenario in particular, means running the risk of distorting the reason for being of OSs in terms of their critical spirit. It also means choosing the easy way and assuming that OSs “operate” properly and differ from other organizational analyses, thereby avoiding further development, as if it has been completed and resolved.

On the other hand, the absence of friction hinders dialogue and confrontation. This requires a thorough knowledge of the

parties to support their own arguments, as well as good listening skills to be able to engage in a dialogue with the interlocutor. As a result of this confrontation, new knowledge emerges, offering new perspectives in the study of organizations and vitalizing the proposal of OSs. In this sense, the petition to go back to the rough ground becomes not only pertinent, but also necessary, given that in Latin America the field is still in a process of maturation, where differences, questions, doubts, and even ignorance are still part of its constitution and identity. As suggested by [Gonzales-Miranda and Ramírez \(2017\)](#), “In Latin America, OSs connote a different type of development and evolution. Their reality and presence in the region is heterogeneous, fragmented, and diverse” (p. 26).

These authors published the Spanish-language translation of *The SAGE Handbook of Organization Studies* ([Clegg, Hardy, Lawrence, & Nord, 2006](#)), where they included reflections for Latin America based on each of the original chapters. A similar exercise was made by Miguel Caldas, Roberto Fachin, and Tânia Fisher with their 1999 publication of the Portuguese-language translation of the first edition of *Handbook of Organization Studies* ([Clegg, Hardy, & Nord, 1996](#)) in three volumes: *Modelos de análise e novas questões em Estudos Organizacionais*; *Reflexões e novas direções*; and *Ação e análise organizacionais*. The work conducted by these researchers demonstrates the rise and development of OSs in Brazil. In consequence, the 2006 text becomes a historical benchmark, since it enables the dissemination “of the theoretical and methodological proposals of OSs in the different regions of Latin America” ([Gonzales-Miranda & Ramírez, 2017, p. 23](#)). In their analysis, after the publication exercise in which nineteen Latin American authors took part, the researchers state that *heterogeneity* suggests that organizational knowledge “does not lead to a common place, but rather shows countless approaches that imply diverse conceptions of its meaning, scope, and possibilities for the analysis of organizations, as well as of its connection with the management” (p. 26). *Fragmentation* explains that the development of OSs in Latin America is divided into regions; therefore, it is worth highlighting the cases of Mexico and Brazil that differ from the continent, where OSs are still incipient. Finally, *diversity* means “the large number of topics, interests, and lines of research that are being proposed in the field of Latin American OSs” (p. 28), showing the breadth and scope of OSs for the analysis of societies through organizations.

In another text, in which the development of OSs in Latin America is also analyzed, [Gonzales-Miranda, Ocampo-Salazar, and Gentilin \(2018\)](#), based on a literature review, found that in the region there is a preponderance of functionalist/positivist studies, basically related to AT. Meanwhile, OSs are becoming increasingly important, as they tend to address organizational problems from

a critical perspective. However, the authors emphasize that “the purpose is not to favor an epistemological stance characterized by an irreconcilable polarity of perspectives, the functionalist/positivist one on the one hand and the comprehensive one on the other; nor is it to stigmatize one of them in terms of value” (p. 104). On the contrary, the results of the study show that no single theoretical perspective is better than the other; they complement each other and coexist in the Latin American organizational arena.

It is undeniable that the steps taken in the region have made it possible to write a history that has mended fences and overcome prejudices against positions and approaches contrary to OSs. At the same time, regional and global recognition has been achieved, though the lack of confrontation and reflexivity usually ends up leading to a comfort zone. This study is an invitation to leave that comfort zone.

OSs IN LATIN AMERICA UNDER DEBATE

It is mandatory to reflect on OSs in the region, given that “one of the main characteristics of Latin American countries is the reduced number of theoretical and field studies” ([Barba, 2012, p. 15](#)). This is perhaps an academic obligation for all researchers who belong to this field of study. It is, at the same time, a suggestive exercise to understand the *collective comprehension* of academics about OSs in Latin America.

It also warns about the need to demarcate the aspects that shape their identity, understanding that delimitation is not being closed to new “conversations,” but is rather the defense of the autonomy—the identity—that rejects the belief that “everything fits” in OSs. This is not possible. There are some characteristics that, without conceiving them as immovable in time, clarify some identity features that demarcate the field. That is the purpose of this paper, which does not focus on answering the questions and reflections raised, but on going back to “rough ground” to obtain the “friction” necessary to build conceptions and proposals appropriate to OSs in the region.

The foregoing is relevant because it helps answer questions such as: How can one know whether a research project falls within the perspective of OSs? Are critical management studies (CMSs) part of OSs? Such studies constitute a pluralistic, diverse, and interdisciplinary field that covers a wide range of perspectives ([Sanabria, Saavedra, & Smida, 2015](#)). For some authors, CMSs are part of OSs; for others, they are two different and essentially unrelated fields of knowledge, because the former aims to analyze management from a postmodern position ([Fernández, 2007](#)), while the latter addresses organizations from a critical theory

viewpoint. Furthermore, many authors of OSs are also recognized as authorities of CMSs. This discussion is not concluded; it is only an example of the relevance of delimiting the field of OSs so as not to fall into ambiguities that turn it into a space where any study on organizations—or on the social aspects or dynamics developed within organizations—is claimed to be part of this field from an alternative–critical stance.

Continuing with this self-reflective exercise and considering what Nord et al. (2017) stated about wanting “to stimulate conversations within and between the different approaches to OSs. In fact, we conceptualized these studies as a series of multiple, overlapping conversations that reflect, reproduce, and refute earlier conversations,” (p. 1) it is pertinent, due to the context and development of OSs in Latin America, to question certain aspects that surround the nature of OSs as noted below.

Are OSs a field of knowledge or a discipline?

Fields are considered “relatively autonomous social microcosms, i.e., spaces of objective relations that are the site of a logic and a necessity that are specific” (Bourdieu & Wacquant, 1992, p. 135). The agents in each field occupy different positions according to the (material or symbolic) resources they possess (“capitals,” in Bourdieu’s terms), in the process of disputes that arise in the singularity of the social microcosm. These differentiated positions of the agents make them participate differently in disputes within the field. This is how, in this conception, there is no linear or consensual progression. The history of each field—of each disciplinary field individually, and of the scientific field in general—is filled with tensions, particularly with the one it reaches at a certain moment, derived from the way in which such disputes are resolved.

In the context of science, each field follows certain ontological, epistemological, methodological, and theoretical assumptions, especially regarding disciplinary differences. In these differences, scholars incorporate dispositions and stances that work as references for interpretation, apprehension, and action in the face of the dynamics of the field and its disputes. The field of OSs, paraphrasing Bourdieu, implies the existence of networks of relatively autonomous relations, “within which all moves are not allowed, in which there are immanent regularities, implicit principles, and explicit rules of inclusion and exclusion, and admission rights that are being continually raised” (Bourdieu & Wacquant, 1992, p. 236). Therefore, what moves are permitted within OSs? What are the rules of exclusion and inclusion? What are the admission rights to enter OSs?

Secondly, a discipline refers to an area of singular knowledge, which has precise limits based on an object of study, methods, theories, languages, and forms of objectification, from which specialized knowledge is produced. Correlated to this, and in Morin’s (1998) terms, “it is an organizational category within scientific knowledge; it establishes the division and specialization of work, and responds to the diversity of domains that encompass sciences” (p. 9). In line with such an approach, discipline “represents specialization in isolation” (Max-Neef, 2004, p. 3), which results in the configuration of hyperspecialized and autonomous knowledge, hence: The disciplinary frontier, its language, and its own concepts are going to isolate the discipline regarding others and the problems that the discipline confronts. The hyperdisciplinary spirit will become a spirit of ownership that prohibits any foreign incursion in its area of knowledge. (Morin, 1998, p. 10).

The term “field” is often used instead of “discipline” to refer to OSs as a strategy—not to categorize them in a positivist and closed approach, but to achieve the beginning of other approaches, to understand rather than to resolve. However, the performative aspect of OSs has also been promoted, linked to the disciplinary aspect as having the potential to change and transform society, regarding the notion one needs to change reality after understanding it—that is, that there is a clear option for praxis, without diminishing the importance of theory. Some researchers have even called themselves *organizationalists*, promoting what is known as “organizational perspective” (Contreras & De la Rosa, 2013), denoting a clear tendency to mark disciplinary aspects of OSs. Therefore, are OSs becoming a discipline in Latin America?

What is critical in OSs?

The critical perspective proposed by OSs implies the ascension of visions that contrast and challenge existing social development conditions because they are considered insufficient and negative. This does not imply a fictitious vision, but requires a thorough and rigorous knowledge of the conditions of possibility that should lead to the transformation of existing structural relationships (Freire, 1984; Misoczky, 2017). In this context, it is possible to understand critique as the ability to look within a field or discipline and account for its own postulates. In other words, it is a self-

reflective process. In line with Misoczky (2017), critique necessarily implies that it must be ontological and must seek to transform society and free individuals from oppressive regimes. Therefore, it is not enough to have a critical methodology, as proposed by Alvesson and Willmott (1992), or to adopt a position contrary to the status quo; it is a matter of looking for a transformation, a praxis that transcends and transforms the hegemonic practices that occur in the approach to organizations (Alvesson & Willmott, 1992). Historically, two lines of thought are identified within OSs: one in *critical theory*, presented by the Frankfurt School, and the other one in *postmodernism* (Saavedra, Marín-Idárraga, & Gonzales-Miranda, 2017). Where are OSs classified? In both?

In postmodernism?

As stated by Alvesson and Deetz (2017), there are multiple approaches to postmodernism, which makes it difficult to define it. From OS in particular, emphasis is placed on the concepts of fragmentation, textuality, and resistance in OS, mainly from authors such as Derrida, Foucault, Baudillard, Deleuze, Guattari, Laclau, and Mouffe (Alvesson & Deetz, 2017). These authors stated that, among the most relevant issues, they were inclined to study:

In the constructed nature of people and reality, language is emphasized as a system of distinctions that are central to the construction process, and it argues against grand narratives and largescale theoretical systems such as Marxism or functionalism. The power/knowledge connection is also emphasized, as are claims of expertise in systems of domination, affirming the fluid and hyperreal nature of the contemporary world and the role of mass media and information technologies, and stressing narrative/fiction/rhetoric as central to the research process. (Alvesson & Deetz, 2017, p. 513).

The focus is placed on the critical point of postmodernism, as it is part of a broader critique that challenges the status quo and supports silenced and marginalized voices (Alvesson & Deetz, 2017).

Where are OSs classified in critical theory?

In relation to OSs, Alvesson and Deetz understand that the use of critical theory is derived from the developed works that take as a

reference the authors of the Frankfurt School (radical humanism), such as Adorno, Horkheimer, Marcuse, and Habermas. Hence, it is expected, from critical theory in OSs, “to create societies and workplaces that are free from domination, where all members have an equal opportunity to contribute to the production of systems that meet human needs and lead to the progressive development of all” (Alvesson & Deetz, 2017, p. 517). Similarly, relevant themes include ideology; communicative action; a critical look at the capitalist system and contemporary organizational society; domination through instrumental rationality; the status of women, workers, and people of color; the goals, values, and forms of consciousness; and communicative distortions within companies, among other aspects, (Alvesson & Deetz, 2017)

It is not enough that researchers assert, perhaps with a certain arrogance, that they have a *critical position* and therefore are within the field of OSs. How to know whether there is a true critique, or what type of critique forms a constitutive aspect of OSs? Not everything with a critical “tone” can be considered as a part of OSs. Then, what criteria would have to be considered for this? What stance (postmodernism or critical theory) should be adopted?

What is the relationship between OSs and the social and human sciences?

Pierre Bourdieu (2003) states that “social science is a social construction of a social construction” (p. 153). SSs take social reality as a study reference—that is, the reality that, practically and symbolically, agents build on the relational reality of the social dimension. It is the individual, surrounded by a set of relationships, who creates and gives meaning to reality. SSs, in turn, seek to determine the way individual and collective action is structured, the way life is given meaning, and to understand how, in that network of relations, reality is constructed, reproduced, and transformed.

As a social construction, SSs have unfolded in multiple options to analyze humans in society, which is why diverse disciplinary divisions, defined by apparently differentiated and distant objects of study, methods, languages, epistemes, and ontological references, have appeared in that field’s history. As a result, the divisions that had been imposed on the world from the disciplinary perspective have been reconsidered (Mardones, 2012; Wallerstein, 1996).

In 1945, as Wallerstein states, there was clarity about the dividing lines between, on the one hand, natural sciences and humanities—alluding to philosophy, literature, and arts—and, on the other hand, SSs—consisting of history, to study

the modern world; economics, responsible for market matters; sociology, oriented toward civil society; and political science, focusing on state matters. In addition, anthropology was confined to the study of the non-modern world (Wallerstein, 1996). After World War II, these limits were questioned, and integrating stances suggesting an ontology of the social world as a complex entirety emerged to gain ground (Osorio, 2002; Zemelman, 1992), evidencing the need for integrations and interrelationships. Therefore, according to Wallerstein (2006), the need for a separation from the traditional divisions of SSs (and SSs from the natural sciences) means recognizing

that the major issues facing a complex society cannot be solved by decomposing them into small parts that seem easy to manage analytically, but can only be truly solved by attempting to treat these problems, both humans and nature, in all their complexity and interrelations (p. 87).

It is continually said that OSs require SSs to understand the social dynamics that take place in organizations; this, in turn, implies recognizing the influence of OSs on SSs (Durango, 2005). Accordingly, this paper introduces two aspects to analyze. (1) Is it possible to take up the theoretical frameworks of SSs such as philosophy, sociology, and anthropology *partially*, without sufficient in-depth knowledge or even basic training in the discipline? (2) The analysis of organizational phenomena does not become comprehensive and critical simply by involving SSs—that is, the approach does not turn critical simply by mandating the application of SSs. In what sense and how are OSs included in SSs? This question calls to reflect on the multidisciplinary, interdisciplinarity, or transdisciplinarity of OSs.

Are OSs multidisciplinary, interdisciplinary, or transdisciplinary?

“Multidisciplinary” means addressing a problem from different approaches. This does not involve dialogue, but requires multiple perspectives to provide diverse answers to the question. As Hernández points out (2017):

Multidisciplinary work resembles a panel of experts, where each presents their point of view of a complex issue, based on their own discipline and the knowledge built within their discipline that is relevant to the problem. (p. 24).

Subsequently, Hernández states that “this way of addressing the problems does not necessarily synthesize the types of knowledge involved, nor conceive a shared task around a problem in which each contributes collectively to the solution” (Hernández, 2017, p. 24). This leads to a cooperation, integration, and exchange exercise (Morin, 1998, p. 15), in the search for connections that are inconceivable from a discipline’s singularity.

“Interdisciplinarity” means

Agreement and cooperation between two or more disciplines, each one contributing (in terms of theory or empirical research) their own conceptual structure, their way of defining problems, and their research methods. (Bottomore, 1983, as cited in López, 2012, p. 368).

At the core of this “way of getting to know reality,” there are some ontological and epistemological assumptions that seek to understand the world in a relational and complex manner. Consequently, a disciplinary search is insufficient due to its specialization, because it does not favor connections in a diverse but interconnected reality. This results in “a new type of knowledge that exceeds the disciplinary and paradigmatic position, and creates, in turn, a common space that enriches the proper epistemological, ontological, and methodological elements of this discipline” (Delgado, 2009, p. 18).

According to Delgado (2009), “transdisciplinarity” is “at an epistemological level surpassing interdisciplinarity because it represents the highest level of knowledge integration” (p. 24). This perspective aims to transcend disciplinary borders, overcoming their limits and suggesting alternatives to build knowledge, that is, “opening all disciplines to those that traverse them and lie beyond them,” as suggested by Basarab Nicolescu’s “Charter of Transdisciplinarity,” adopted at the First World Congress of Transdisciplinarity, held in 1994.

The foreign definitions and approaches of some notable texts on OSs often declare that OSs are an interdisciplinary field (Ibarra-Colado, 2008). Is this true? Does that conform to the Latin American reality? Why can they not be “pluridisciplinary”? The studies conducted from an interdisciplinary view are very few. The first reason, already mentioned, is that not all researchers are trained in a diversity of disciplines; the second reason is that not all problems can be addressed from all disciplines.

What theoretical frameworks constitute OSs?

What are the theoretical frameworks that form or are part of the *theoretical corpus* of OSs? What are the criteria to accept one

or the other? Does it depend on the research proposal or the critical perspective used? Can the same theoretical framework be found in two different epistemic perspectives? “If everything fits in something, this ‘something’ does not exist,” according to a saying in philosophy. If everything fits in OSs, the very OSs become distorted.

Researchers have classified different topics onto OSs, resulting in the identification of trends that are related, though not exclusively, to the OS corpus. The new institutionalism, organizational knowledge and learning, culture, organizational sociology, postmodernism, critical theory, etc., can be found among them (Gonzales-Miranda, Ocampo-Salazar, & Gentilin, 2018). However, beyond elucidating the classifying criteria, one concern emerges—creating, in turn, another tension. The field should be flexible enough to include other emerging theoretical frameworks that are being developed in Latin America and are claimed to be part of OSs.

Colonialism, gender, entrepreneurship, and innovation, among others, are examples of the subjects that researchers choose for analyzing the social dynamics in organizations. An additional concern is that many times, within these topics or in the very OSs, analyses take place without linking them properly to organizations. If the object of study is organizations, a variety of topics and disciplines are expected to delve into the organizational aspects, based on their own academic interests and theoretical frameworks. Does it need to be stated that such research projects are within OSs?

Do OSs have their own methodological perspective?

Considering the comprehensive nature of OSs, there is a virtual consensus for using the qualitative approach in studies. This is understandable, since the aim is to elucidate the meanings that actors assign to their actions. Nevertheless, one is also allowed to question the possibility of addressing organizational phenomena from a comprehensive vision by using a quantitative approach, or else by conducting mixed methods research. Furthermore, authors such as Medina (2010) invite the acceptance of methodological anarchism in the hope that innovative methodologies can be tested to study organizations. Another issue is quasi-exclusivity, or the tendency to choose an approach or strategy based the case study.

The extensive literature in this regard shows multiple conceptions of how to understand the case study: as a strategy (Archenti, Marradi, & Piovani, 2018; Galeano, 2012) or, as Simons (2011) points out, as an approach (differentiating it from method

and strategy). Broadly speaking, and according to Stake (1999), “The case study is the study of the particularity and complexity of a single case, coming to understand its activity within important circumstances” (p. 11). In other words, “the case study is the study of the singular, the particular, the unique” (Simons, 2011, p. 19). The case may be “an individual or collective unit—a person, an institution, a business, a program, a policy, a community, a system, a country” (Archenti et al., 2018, p. 292), as well as the research intentions “that impact the chosen methods to collect data” (Simons, 2011, p. 20).

On one hand, several authors resort to not reducing the case study to its methodological aspect (Galeano, 2012; Simons, 2011; Stake, 1999); on the other hand, it is understood that the methodological aspect comes from the very construction of the case, from the object of research. The case study “is not about a methodological option, but about choosing an object of study; what defines it is the interest in the object and not the method” (Archenti et al., 2018, p. 292).

On the other hand, when discussing its quantitative or qualitative nature, regarding the research techniques used in the case study, the use of qualitative techniques stands out; however, the quantitative nature is not discredited, but, depending on the study, is considered to be significant or not. As Simons (2011) states, “A case study is not synonymous with qualitative methods” (p. 40). Finally, when talking about the case study, it does not refer to a unique case, as the researcher can take multiple cases (Stake, 1999; Yin, 1994) to analyze them in a research project.

With this outlook, where in OSs is there exclusivity for this method–strategy? Can researchers be critical using a quantitative approach, and why is this type of study not fostered? What is a case study? Is it a method, as Stake (1999) states, or a strategy, as Yin (1994) does? Many times, things are taken for granted without the proper support or justification, and reviving the particular, with no universal assertions, is taken as conducting a case study.

Do OSs distance themselves from management?

The last element to be considered in this reflection exercise on OSs in Latin America is the relationship between this field of knowledge and management as a discipline (Rosa & Contreras, 2007; Echeverry, Chanlat, & Dávila, 1996; Kliksberg, 2005; Ocampo-Salazar, Gentilin, & Gonzales-Miranda, 2016). It is clear that OSs focus on the object of study of management, that is, on organizations (or their performance) and on the social dynamics that occur within them. Due to its nature, management does not

have the required basis to be considered a science capable of giving universal signs of action and replication to its acts. Along with this, the approach of OSs implies “the creative destruction of existing formulas, recipes, and practices intended to reinvent the organization” (Clark, Clegg, & Ibarra-Colado, 2000, p. 123).

However, no organization is unsusceptible to management. In this sense, the relationship between management and organization is evident, and its analysis is imperative and irreplaceable (Gil, 2005). Far from treating them as watertight compartments and stigmatizing their positions, principles, foundations, and scopes, it is worth approaching them as complementary, since understanding the social phenomena better ends up positively impacting management. Works such as those by Ramírez, Vargas, and Rosa (2011) aim to build and define such bridges. However, the Latin American reality, overall, still has different opinions concerning this type of approaches, and some integrate excessively said realities to such a degree of showing no differences in an act that, instead of integrating them, distorts both realities (Fernández, Paramo, & Ramírez, 2008; Medina, 2010).

HOW TO BUILD A LANGUAGE PROPER OF OSS BASED ON A LOCAL CONTEXT AND REALITY?

Regarding ways of thinking and approaching reality, dialogue is enriched and learning spaces are favored by heterogeneity, diversity, and difference. Consequently, criteria that tend toward a mechanical and Cartesian universalization of reality are not intended to be unified. However, ambiguity introduces error, confusion, and certain relativism, where “everything fits.” Thus, it becomes a complicated situation, a challenge. The discussion so far prompts the delimitation of the field, when it seems that what characterizes it is precisely that non-delimitation. Hence, is it possible to reconsider a definition that demarcates and restricts OSs and prevents them from holding other approaches? A paradox then emerges, encouraging thinking.

As a result, there is a clamor and a claim—so to speak—for the identity of OSs, for “that which makes that something is one thing and not the other,” or, in more organizational terms, for that which is central, distinctive, and durable (Albert & Wheten, 1985; Gonzales-Miranda & Uribe, 2018). Nevertheless, in view of such intention that can place the discourse in essentialist terms (Ashforth, Rogers, & Corley, 2011), an *apparent contradiction* is structured. In Dubar’s (2002) words, identity is the result of a double linguistic operation: *differentiation* and *generalization*.

The former defines difference since it influences singularity in relation to other fields. The latter intends to define the common nexus of a series of different elements; thus, identity is common belonging. *These two operations are at the origin of the paradox of identity: what is unique is what is shared.*

What generalizes OSs?

There are many other fields of knowledge and theoretical approaches that share their own aspects with OSs. The critical spirit and the recurrence to SSs and humanities to study and analyze social aspects in organizations are among them. However, these two aspects are not essential, nor do they become a unique, deciding criterion. There are diverse modalities in the study of organizations that not only share these two characteristics, but also differentiate themselves regarding their space–time conditions, issues addressed, paradigmatic position, and methodological orientation. Table 1 summarizes the diverse modalities based on the proposal by Rendón and Montaña (2004).

The aim of this general presentation on the main trends in the study of organizations is to highlight their dissimilar theoretical approaches, which have prevailed for more than a century. It is clear that the development of each of them turns into something necessary to achieve a deeper understanding. However, the intention is to contribute to a vision that offers a wide outlook on the study of organizations, and to show the common points within the diversity of approaches. Moreover, this study’s purpose, above all, is to question the air of exclusivity conferred to OSs with no support other than ignorance and, perhaps, vanity, masked with the arrogance of believing that it is the only organizational approach alternative available for the academic world, when, within the *organizational zoo* (Perrow, 1984), there are actually many parallel frameworks and currents that coexist in the universe of possibilities to study organizations.

What differentiates OSs?

As it was announced at the beginning of this discussion, the objective is not to formulate the definition of OSs, although the considerations posed, in the end, aim at and contribute to such purpose. Nevertheless, besides the analysis presented—as a first exercise to delimit the field—and unquestionably fostered by previous questions and thoughts, a set of important considerations are detailed to highlight the particularities of OSs.

Exhibit 1. Modalities of study of organizations

Lines of thought	Origin	Orientation	Foundation	Object of study
Management	American (born with the great railway company). Chandler	Functional.	Prescriptive models based on experience.	Company.
Organization theory	American (unclear origin) scientific management, systems theory or human relations. Simon, Cyert and March.	Functional, with a broader social content.	It is constituted as a field of knowledge in itself.	Productive organizations (mainly). Close relationship with management.
Institutional analysis	French.	Critical. It questions the excesses to achieve excellence.	Psychosocial analysis. Unconscious elements that underlie every organization and prevent a more harmonious and balanced development.	Organization from the unconscious. Little known line of thought.
Sociology of work	French (Mexico and Brazil joined). Touraine and Naville. Freedman.	Critical (the institutional approach prevails).	It emphasizes aspects such as technology, working culture, gender, etc.	Themes that evolve as society transforms.
Sociology of organizations	Weber's inheritance (American sociological tradition with Merton and Gouldner, and French with Crozier).	Socio-constructivist.	It highlights the issue of power to "correct" the type of bureaucratic ideal.	Power in organizations. Public organizations.
Organizational analysis	It has no precise boundaries.	Socio-constructivist.	Eclectic stance. Particular modality of the sociology of organizations.	Collective action, organization as a process.
Sociology of the company	It emerged from sociology to study companies. Sainsaulieu and Segrestin.	Social (emerging field).	Social actors have an important place in the analysis.	Company.
Organizational studies	European (English sociologists).	Critical. Little relation with administrative theory. It takes elements from sociology of work and sociology of organizations.	It takes up organization theory from a critical point of view and incorporates the issue of culture and power to counteract American hegemony.	Organization. Little relation with management.

Source: the authors, based on Rendón and Montaño (2004).

A community around the study of organizations

The concept of community has been used in numerous forms by SSs. Its passage from anthropology to different disciplines has been swift and easy to accept, thanks to the simplicity of its meaning, whose first sense refers to every human grouping. However, the term is used to delimit human groups having a strong link, such as a religious one, or identity traits that keep it united, as in academia.

In this regard, Kuhn (1971), in his renowned work about academic—also called scientific—communities, states that these communities share a disciplinary matrix that should be understood as a set of elements—components around which its unity is built. Above all, it is important that such communities produce and validate academic or scientific knowledge through consensus. A discussion is introduced here: whether said knowledge, accumulated by practical experience, science, and technology, is not integrated but, on the contrary, consists of a juxtaposition of more-or-less consistent knowledge systems, as parts that show no coherence or even compatibility among them, since they are poles apart with specialized visions that mark and deepen differences (Schutz, 2003). As Bauman (2004) suggests, identities are volcanic crusts that harden, melt again, and frequently change.

Indeed, it would seem that OSs in Latin America are developing in such a way that incompatibility is their biggest feature and, therefore, they could hardly be considered a community as such. Despite epistemological differences or theoretical approaches, the object of study, and the critical view—that is, criteria that are often used interchangeably to find some sort of theoretical classification—there is a group of researchers that distances itself from the merely functional and instrumental to critically think and dig deeply in organizations.

In addition, the community is also made up of affections that lead researchers to favor a friendship relationship among colleagues, which allows them to build alliances and, as a result, to collaborate at the institutional and personal levels, to configure a particular thinking that respects differences and diverse views, but that groups itself around OSs. Therefore, the construction of dialogue spaces is significant, which favor academic meetings such as colloquia and conferences, as well as joint activities that promote research in this field of knowledge.

An object in constant organizing process

The concept of “organization” can be narrowed down by a functional—operational vision if it is considered as a set of individuals with common interests, who get together under certain

structures and whose purpose is the efficiency and productivity of actions. From a more flexible and dynamic point of view, it is also conceived as a social and concrete entity with a certain lasting nature, with its own recognizable characteristics, and as a space within which social dynamics are developed and built.

In this way, the meaning of the organizational is not noticeable; the phenomena present there turn into the unintelligible, which struggles to stand out, but hides latently in the dynamics of the human creation. Thus, the academic effort will focus on making it intelligible and, therefore, on making *the organizational* understandable (Gonzales-Miranda, 2014, p. 55).

The particularity of what is latent and the task of making it intelligible involve and require a certain theoretical framework. On that account, the interpretation and understanding of social dynamism will arise from the theoretical lens used, and, depending on the relevant and proper use of such a framework, the conceptualization of organization will vary.

Thus, the organizational component is merely the particular shape of social dynamics that occur in a specific way, which will be unique depending on each organization. In that sense, there will be no organizational identical to another, since the social fabric will be different, even though there are certain structural similarities shared by those belonging to the same economic sector. In addition, the organization component also refers to each entity’s own organizing processes. The play on words between the noun and the verb explains a continuous dynamic of change and adaptation of the organization to the environment. This mobilizes its internal structure in such a way that it can adjust to the environment where it is located. Understanding the organizing process implies social developments on the construction of meaning, delimited by space–time dimensions that make them incomparable and, in turn, subject to constant change. This entails the need to clearly contextualize the organization and its course, while at the same time implying a detachment from any pretension of universalization.

This discussion also focuses on the object of study of OSs. It is valid to state that the object of study can be true or only a representation of that reality. Therefore, it could be said that it is a theoretically reconstructed object that has a place in a specific organization, and is a reflection of the possibility of search and analysis; or it is an empirical organizational process, thanks to methodological tools, seeking the possibility and relevance of its study in a coherent and consistent way. Furthermore, the object of

study may also refer to dissecting the organizational component to emphasize some of the dynamics and processes, such as culture, decision-making, power relations, among others.

Regarding the above, and according to [Rendón and Montaña \(2004\)](#), this object can assume two ontological positions: its real existence outside the individual (independent of thought) or its construction as a methodological tool. In this way, the object of study is a device of the researcher that does not correspond faithfully to reality. It is a theoretical construct thanks to the presence of an organization which extends from the inside out (from the small organization to the interorganizational network) or vice versa (particular processes or structures—organizing), and which is limited by space–time dimensions. The latter influences its definition, since the object to be studied does not depend exclusively on the will of the researcher despite its construction. This is because delimitation implies considering the historical stage in which the specific problem is framed, the particular development of methodological tools, the theoretical approach, and the diverse modalities of representative social relations of the moment.

The reference to the substantial conversations of [Nord et al. \(2017\)](#) with other conversations is better understood here. It occurs as a spiral of knowledge, where the first conversation takes up the previous one to reach, in the next one, a deeper level of discussion and thus better understand the organizational phenomenon. Therefore, it is necessary to take a diachronic, rather than a synchronic, approach that unites a set of disciplines to decipher the multiple links, tensions, subjectivities and intersubjectivities, affections, meanings, power relations, communication, and symbolic meanings, among others. These are part of that complex reality represented by organizations and make all organized phenomena express the underlying social reality ([Mandiola, 2016](#)).

The critical approach

The critical component in OSs refers to works that have “a deliberate and explicit intention of questioning elements immersed in the tradition of the field that has studied them and in the relations of domination linked to it” ([Sanabria, Saavedra, & Smida, 2014, p. 211](#)). Accordingly:

The task of critique in OSs is therefore to counter the “positive” version of critique that is made from within management, which does not question its essence and its function with regard to the reproduction of social structures that

constantly generate victims; it is an ethical and ontological critique. ([Misoczky, 2017, p. 147](#)).

There is an emancipatory purpose that embodies a critique of the status quo that seeks to prevent administrative practices from objectifying the individual’s humanity ([Carvajal, 2002](#)). Some of the different works include those inspired by the Frankfurt School, and the proposals that [Alvesson and Deetz \(2017\)](#) understand as the critical point of postmodernism, given its challenge to the existing world and its support for silenced or marginalized voices. Similarly, critique implies a praxis that, on the one hand, seeks understanding of the world and of the conditions of possibility that at a given moment have been constructed and allow for or limit the practices of freedom and, on the other hand, aims to search for the construction of alternative scenarios that allow for different social links, which leave aside relations of domination. Critique advocates individuals and groups free from “repressive social and ideological conditions, particularly those that impose socially unnecessary restrictions on the development and integration of human consciousness” ([Alvesson & Willmott, 1992, as cited in Saavedra, 2009, p. 56](#)).

As discussed in the previous sections, this is a crucial issue that still needs to be delimited, but its presence, as part of the style of analysis of OSs, is undeniable. Although the very definition of critique has yet to be defined for the region, this is an issue that constitutes and shapes a distinctive and therefore identity-based aspect of OSs. Undoubtedly, depending on the countries of the region and the history and structure of the field in each one of these places, the term will denote and cover different frameworks. However, the critical approach will certainly not be absent from the process of analysis and reflection that underlies all research processes in OSs.

A concern for the education of students

Research and teaching are not separated; understanding the organizational phenomenon does not contradict teaching. In this sense, there is a pedagogical strategy that aims to cultivate another means of approaching organizations in a critical and propositional way. It encourages students to think in a different way about the social organs called organizations, while at the same time proposing different alternatives for being in and understanding the world around them, and thus greater and better possibilities for intervention management of them from an ethical and responsible conception.

In this way, the proposals of OSs complement the training of students in administrative and management issues. This does not demonize or discredit the functional-operational component of management; rather, recognizing its limitations and scope, it tends to complement it. It is clear and necessary that organizations should be well managed, with a sense of social responsibility and respect for the dignity and development of their members, and that they should also ensure the fair and proportionate achievement of expected returns for shareholders. In this way, without falling into recalcitrant dogmatism and exacerbated complaints, it is important to achieve a fair measure that balances both positions. Although what is “fair” may be difficult to achieve and to define, it is crucial for OSs in Latin America not to deny the administrative reality of management that integrates these tensions. Otherwise, they would aim at generating preconceptions and prejudices which, far from integrating critique into management, would end up ignoring or rejecting it.

FINAL THOUGHTS

The process of building a Latin American identity unquestionably involves knowing the organizational reality of this subcontinent. It is a task that requires the identification of characterizing themes and problems. Hence, they are constituted in categories that not only delimit the reality of Latin America, but consequently make it possible to show the differences with other latitudes where OSs emerged and have certainly consolidated (Europe and North America). In this process, it is important to take up the foreign references and make an appropriation “of our own” that explains the reality of the region, which leads to elaborate theoretical proposals and own alternatives of intervention that respond concretely to the vicissitudes and particularities of the Latin American subcontinent. The questions and reflections presented in this article have sought to contribute to this task.

A text by Argentine writer [Ernesto Sábato \(2000\)](#) provides insight into some of the challenges that the Latin American academic community faces in building its own language in the study of organizations. As part of this final reflection, it is worthwhile to encourage the appropriation of the ideas of such a famous Latin American writer:

I believe we must resist: this has been my motto. But today, how often have I asked myself how best to embody that word, how to live resistance! Before, when life was less hard, I would have understood by resisting an heroic act, like refusing to continue riding this train that drives us to mad-

ness and misfortune. Can one ask people who have vertigo to rebel against it? Can one ask the men and women of my country to refuse to belong to this savage capitalism if they support their children, their parents? If they carry this responsibility, how are they going to abandon this life?

The situation has changed so much that we must carefully assess what we mean by resistance. I cannot give you an answer. If I had it, I would emerge as the Salvation Army, or those delirious believers—perhaps the only ones who truly believe in testimony—to proclaim it on the street corners, with the urgency given by the few meters that separate us from the catastrophe. But no, I sense that it is something less formidable, smaller, like faith in a miracle, which I want to convey to you in this letter. Something that corresponds to the night we live in, just a candle, something with which we can wait (p. 85).

Resistance is part of identity. People resist because they defend what they are; they close ranks around what they consider to be their own, and refuse to change, at least in a fundamental sense. While there are many ways to understand resistance, it is undeniable that it has an unequivocal relationship with identity. Thus, following the author, the construction of a language is an invitation to consider the following.

The constitution and consolidation of a Latin American identity requires knowledge of its territory, and, in that sense, it is necessary to go deeply into the particular and unique way in which these organizations develop and survive day by day. Thus, referring to what [Chia said \(2015\)](#) at the beginning of this discussion, the reality of quotidian matters allows for the identification, understanding, and analysis of what is “Latin American” about these organizations. This favors a deconstruction far from preconceived foreign references, and a constant preconception of what Latin America is for the rest of the world. Considering one’s own discourse based on an analysis of the different local realities of Latin America will undoubtedly unite the understanding and knowledge of the global organizational society.

This implies recognizing a constant tension to avoid colonization, which is closely related to not falling into the logic of academic capitalism in its various manifestations, which Sábato calls “savage.” Hence, one of the ways to constitute a regional community regarding OSs consists in demarcating the lines of dissemination in journals and academic environments.

These spaces should provide the means to explain and express a unique development, avoiding the need to sacrifice the critical spirit and the local comprehensive view. It also prevents falling into the vortex of publishing in high-impact journals according to international pressures, which is an aspect that is well received for the criteria of accreditation, if not demanded. In that sense, resistance implies the achievement and strengthening of Latin American spaces of dissemination that operate with publishing logics far from editorial projects that make the ranking criteria prevail over the production and dissemination of knowledge that responds to the real needs of the region.

Another form of resistance is lighting a candle. What does this mean? Candles have been associated with waiting, with the virtuous capacity to wait, which leads to hope. What is expected? It is expected that life in the organizations will respect the dignity, autonomy, development, and legitimate rights of those who are a part of it. It is basically about contributing from academia to build a society where everyone fits. It is also about generating awareness that contributes to a transformation; and, when necessary, the courage to denounce practices that go against this integrity. Language implies a call to action from the local reality to study Latin American organizations—not just a call to contemplation in the form of a theoretical thought (always relevant and urgent, perhaps a starter), but also to the concrete transformation of organizations.

The students in classrooms today will become the leaders with the responsibility to accompany and guide future generations in organizations. It is important to help sow actions and see them materialize, which will lead these men and women to respect human integrity. Although today it is not possible to see the scope of what can be built from the Latin American OSs, hope allows having confidence and thus working tirelessly to achieve it. Work is not done for what is seen today, but for what is wanted and desired in the future.

This document is not intended to be a tool for leveling, but rather a means to return to the rough ground, to return the questions about those aspects of identity still under construction. It also proposes to return to the difficult questions that get people out of permanent comfort and force them to think, to listen to others, to learn—to continue the seemingly endless process of maturation. At the same time, it is an opportunity to continue writing the history of Latin America in a language “of our own;” it is the process of building community from the difference that enriches dialogue. Dissent, openness to other approaches, and critique are therefore always welcome, as they manifest the style of dialogue in the field that seeks to understand organizations.

Finally, it aims to cover the rough, stony, and difficult ground of OSs in Latin America, as the region needs friction to move forward.

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AUTHORS' CONTRIBUTION

The author declare that they participated in all stages of development of the manuscript—from the conceptualization and the theoretical–methodological approach, through the theoretical review (literature survey), and finally, to the writing and final review of the article.