

# Organization Studies and Epistemic Coloniality in Latin America: Thinking Otherness from the Margins

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**Abstract:** This paper discusses the current state of Organization Studies in Latin America, disclosing the epistemic coloniality that prevails in the region. Adopting an approach based on the recognition of the relevance of the geopolitical space as place of enunciation, the paper sustains the relevance of the ‘outside’ and ‘otherness’ to understand organizational realities in America Latina. The argument is developed in three sections. The first section establishes the main characteristic of the development of Organization Studies in Latin America as its tendency towards falsification and imitation of the knowledge generated in the Centre. The second section recognizes the role played by the term ‘organization’ as an artifice that facilitates the comparison of different realities through their structural variables, but also the inability of this term to recognize any reality that escapes instrumental rationality and the logic of the market. It also articulates the increasing importance of such a concept in the context of neo-liberalism. The third section concludes by renewing the urgency of appreciating the organizational problems of Latin America from the outside by proposing a preliminary research agenda built from original approaches that recognize otherness. Key words: epistemic coloniality; Latin America, organization studies, otherness

*. . . The European elite undertook to manufacture a native elite. They picked out promising adolescents; they branded them, as with a red-hot iron, with the principles of western culture, they stuffed their mouths full with high-sounding phrases, grand glutinous words that stuck to the teeth. After a short stay in the mother country they were sent home, whitewashed. These walking lies had nothing left to say to their brothers; they only echoed. From Paris, from London, from Amsterdam we would utter the words ‘Parthenon! Brotherhood!’ and somewhere in Africa or Asia lips would open . . . thenon! . . . therhood!’ It was the golden age.*

Jean-Paul Sartre

## The Problem

Who remembers Jean-Paul Sartre (1905–1980) 100 years after his birth? Who remembers Frantz Fanon (1935–1961) and *The Wretched of the Earth* (Fanon 1965)? Let us begin by pointing to this double amnesia. It is easily explained by the

discomfort that their opinions still produce.<sup>1</sup> These clever social thinkers were not simply confronting modernity as a rhetorical gesture; they understood the essence of modernity in a deeper sense. Hence, the relevance of the pointed words of a lucid European commenting on the devastating indictment of an insubordinate non-European, stripping Modernity of its gaudy trappings to reveal its victims. The ideas and actions of Sartre and Fanon enable us to focus immediately on the issue that concerns us here: a dimension of coloniality often ignored, having to do with the *conquest of identities through knowledge*. Specifically, our concern is *epistemic coloniality*, the processes by which the institutionalization of knowledge as scientific knowledge permitted the integration of native elites into the dominant Anglo-Euro-Centric ideology of modernity (Florescano, 1994: 65).

In addressing Organization Studies, we are dealing with one of the most important forms of epistemic coloniality of the last 150 years. Chronologically, we first find engineering knowledge, then psychological knowledge and finally management knowledge (Shenhav, 1999: 71; Rose, 1999: 54–5). These forms of knowledge ordered and simplified the world by means of instrumental rationality. Thus, it is necessary to recognize the ‘coloniality of knowledge’ as the root of the ‘coloniality of power’ (Quijano, 2000; Mignolo, 2000). Further still, it is suggested that organizational knowledge is a particular example of epistemic coloniality (Banerjee and Linstead, 2001; Cal’as and Smircich, 2003; Prasad, 2003a; Frenkel and Shenhav, 2006).

My analysis here will then be carried out from its own exteriority. That is, it will be done from the invaded ‘outside’ that was fabricated by the ‘inside’ invader. The aim is to recreate ‘otherness’ by confronting the image of Latin America (or Asia, or Africa, or the Caribbean) that was projected from the Centre with the authenticity of its own (native) practices and ways of being. This is not an easy task because it is full of pauses, shades of meaning and silences that must be recognized. Unlike Anglo-Saxon approaches to these analyses (March, 1965; Clegget al., 1996; Tsoukas and Knudsen, 2003; Jones and Munro, 2006), Latin American analyses have not yet arrived at a balance of knowledge that can take into account the origins, development, present state and future perspectives of Organization Studies (Ibarra-Colado, 1985). That is, to discuss Organization Studies in Latin America is to discuss the importation, translation and repetition of knowledge produced in the Anglo-Saxon world, and thus it is the history of a false discourse. Such is the thesis that I will try to defend here, as a contribution toward clarifying the falsity of this strange montage, for it is widely accepted as locally valid, as if translations into Spanish and Portuguese meant an immediate *naturalization*.

Reasons abound; one may say that Latin America lacks the necessary communicative and organizational capacities to enable local knowledge to spread throughout the continent. Mostly, the academic and professional associations in the countries of our region are small and new. The same thing occurs with the academic journals that are published with surprising irregularity. Yet, concurrently, ‘global knowledge’ is developed and distributed by large American and European universities and powerful publishing houses in the form of books, journals and, more recently, electronic resources, even if sometimes texts that consist of Anglo-Saxon content are delivered with a Latin accent and tropical perfume. Altogether,

locally generated ideas do not find their way into the networks of power that constitute global knowledge. Thus, it is my intention, and it is an urgent one, to *reclaim the reality of organizational knowledge from this region*, which has been hidden for too long in merely local discussions.<sup>2</sup>

It is necessary to write this history for several reasons. First, we must point out that the very idea of ‘organization’ has been reinvented as an indispensable *artifice* that homogenizes different realities. This dominant concept of ‘organization’ formulates the nations of the periphery as imperfect expressions of the nations of the Centre. Even though its limitations are obvious, this concept has acquired greater relevance in recent decades due to the insidious implementation of neo-liberalism and the rationality of the market in Latin America as elsewhere. These same facts help to explain the increasing importance of Organization Studies throughout the region.

Second, it would be difficult to deny that modern societies all over the world are now governed by the imposition of instrumental rationality. Such rationality has been adapted into modes of organizing quickly gaining autonomy and producing risks and unexpected effects everywhere. Organizational problems are nowadays a permanent preoccupation; they prefigure the challenges and possibilities confronted by global modernity (Ibarra-Colado, 2006). Yet, advantages of modernity must now be considered together with opportunities offered by different modes of organizing founded on the (hitherto ignored) existence of ‘otherness’ (nos/otros, us and them).

The recognition of ‘otherness’ brings us to understanding that global inclusion should not eliminate the particularities of every local reality (Clegg et al., 1999; Radhakishnan, 1994). Even if globalization seems to mean the elimination of differences, there is evidence everywhere that indicates that these differences remain and multiply (e.g. Appadurai, 1990). Therefore, it is necessary to analyse organizational problems in Latin America from its exteriority; that is, to see ourselves as colonized nations searching for our own identity by means of *re-cognition* of our local forms of organization and management, and by recovering *cognitive forms* so deeply rooted in our countries.

Third, no matter how difficult it might be, Latin America, as well as other regions of the world that have endured colonization, must *provincialize* Europe (and consequently the United States). This must be done in order to come to terms with the fact that the world is both Anglo-Euro-Centric Modernity and Otherness (Dussel and Ibarra-Colado, 2006), which recognizes the importance of geopolitical space in the construction of our identities and our different forms of being. This concerns not only economic and social differences; it is related above all to epistemic differences. Hence, what is under dispute is our capacity for intellectual autonomy and our capacity for seeing with our own eyes and thinking in our own languages (Spanish, Portuguese, Nahuatl, Aimara, Zapotec, Quechua or Mapuche), even though sometimes we must write in English. As Dussel points out: ‘To be born in the North Pole or in Chiapas is not the same thing as to be born in New York City’ (Dussel, 2003: 2).

When we consider the problems of our countries through the eyes of the Centre, what we are doing is accepting unreflectively the problems of the Centre in

its effort to submit and dominate the region. Thus, we see the Centre's constant effort to impose on us its idea of modernization as the only available option, but just as with any sort of loan, the interest rates have always been enormous. This *useless dependency* on the knowledge of the Centre (useless because the problems modernization set out to resolve are still with us, and aggravated) emphasizes the urgency of moving from translation and imitation to original creation as emancipated creation. Only then will we be able to break our silence and start a real transformation.

A different organizational knowledge is needed, constructed from the perspective of 'otherness'. It must be *original* insofar as it relates to its origins and is not the result of translation, imitation or falsification. It must analyse the organizational realities of Latin America from the standpoint of the specific history of its economic and political formation and from its vast cultural heritage. These realities function under modes of rationality that differ significantly from the instrumental mode of the Centre. These are, in short, the orienting ideas of this meditation, which I develop in following three sections: The first one establishes the main characteristic of the development of Organization Studies in Latin America as its tendency towards falsification and imitation of the knowledge generated in the Centre. The second section recognizes the role played by the term 'organization' as an artifice that facilitates the comparison of different realities through their structural variables, but also the inability of this term to recognize any reality that escapes instrumental rationality and the logic of the market. It also articulates the increasing importance of such concepts in the context of neo-liberalism. The third section concludes by renewing the urgency of appreciating the organizational problems of Latin America from the outside by proposing a preliminary research agenda built from original approaches that recognize otherness.

### **Organization Studies in Latin America: A History of a Falsification**

Organization Studies has had little relevance in Latin America although the situation is beginning to change. This lack of substance in Latin American social research is explained, among other reasons, by the colonial condition that gave form to the region. That is, the plundering of Latin American natural wealth, that provided an engine for the development of the Centre, caused structural poverty and exclusion for the countries of this region. For a long time, the debate focused on the functionality of the State as promoter of economic wealth and 'modernization'. Consequently, while national governments ushered industrialization with the promise of progress, Latin American researchers analysed why these policies failed repeatedly, reproducing and worsening the problems of the region.

The debates surrounding the Latin American situation acquired great strength in the 1960s and 1970s partly due to positions taken by the Economic Commission for Latin America and the Caribbean (CEPAL in Spanish) concerning the conditions of the Latin American Periphery (Bielschowsky, 1998), and partly

due to insights of Latin American researchers that confronted ‘developmentalist’ postures with ‘dependentista’ explanations, thus revealing conditions that encourage asymmetrical exchanges (Grosfoguel, 2000; Kahl, 1976).

Hence, Latin American ideology was occupied with a wide ranging discussion concerning essential economic, social and political issues, while leaving aside issues concerned with organizational structuring, its functioning and its development. Most social science research focused on structural development difficulties, poverty, political conflicts, social movements and the authoritarian governments that made democratization difficult.

Concurrently, Organization Studies lacked strong foundations for conceptual development because businesses and other social structures were dependent essentially on the political decisions of a given regime. This marginal position of Organization Studies reveals the conditions under which Latin American economic and social life operated. For a long time, the functioning of businesses was subordinated to the protectionist and oligarchic logic of the State, which shaped economic development while preventing ‘efficiency’ to become a fundamental principle for action. Colloquially speaking, corporate success was more closely related to the ghost of Machiavelli than to Weber’s spirit of capitalism.

For the last two decades, however, the economic opening up and the implementation of the rationality of the market have modified this scene. These changes have offered researchers an incentive to look at specific problems of organization, governance and performance. More specific research focused on growth and transformation is now a priority of businesses and other social organizations (including government agencies) which are now acting on their own account and have to vouch for their actions. More exact knowledge about the relations between these organizations’ strategies, structures and outcomes seems to be urgently required. As long as the market criterion is imposed as a principle of regulation (i.e. inasmuch as decision making does not depend on the actions of the State), understanding organizational dynamics becomes crucial. Furthermore, the role of global competition in the fulfilment of economic and social outcomes will mostly explain the results (positive or negative) attained in the region. This shows, on the one hand, the relevance and possible asymmetries of discussions concerning the processes of restructuring at a global level. On other hand, it shows also the conditions under which Latin American countries and their agents design strategies to deal with the region’s integration into the new economic and political geography of the planet.

As such, with the implementation of neo-liberalism, the concept of ‘organization’ has been incorporated into the daily language of our countries and is being used to explain the economic problems that result from the rationality of the market. It may be said that we are going through a *falsification* process. This means that the organizational knowledge of the Centre has been transferred and translated into the region in such a way as to interpret problems without taking into account political considerations. Purely technical arguments dominate everything. From this perspective, we are not dealing with a problem of unequal exchange between nations but with deficiencies in organizational designs, which obstruct the productive and efficient functioning of our countries.

Hence, we are facing a new stage in which Organization Studies and social engineering become strategic knowledge aimed at the maintenance and reproduction of the *colonial difference* in the context of globalization,<sup>3</sup> legitimating to some extent the corporate domination of the world economy. This coloniality intends to impose a definition about what are relevant problems, and under which frameworks must they be treated and solved. Such distorted knowledge clearly reveals the existence of coloniality of knowledge, that is to say, the ways in which knowledge is used as a form of control to hide the colonial condition (Mignolo, 2000).

Despite the fact that Organization Studies as knowledge has advanced irregularly in Latin America, it is possible to recognize certain colonization tendencies in these advances.<sup>4</sup> For a start, the *mechanical transfers* of programs and academic textbooks from the Anglo-Saxon world can be seen everywhere with the evident dominance of American influence (Wong-Mingji and Mir, 1997; Olds and Thrift, 2005). Business schools in the region, which started in the early 1950s, adopted the syllabus of their American equivalents (Alvarez et al., 1997). Thus, the education of professional managers centred on the totalitarian pragmatism of the ‘one best way’ and the supposed scientific character of a set of logical and highly formalized mathematical knowledge. Nevertheless, the study and application of these models and techniques had to be ‘tropicalized’ in order to confront the cultural specificities of each country (Prasad, 2003b: 156–8).

This process of epistemic colonization has been assisted by the increased translation of textbooks distributed by large publishing houses from the United States and other dominant Anglo countries, which guarantee the reproduction of their ideology.<sup>5</sup> The analysis of syllabi from any Latin American university reveals the widespread presence of well known American authors.<sup>6</sup> Similarly, there are falsifications under the signature of ‘Latin American’ authors<sup>7</sup> that have acquired the ability to think like Americans to the point of ignoring their native reality by abdicating their own identity.<sup>8</sup> Furthermore, we must not forget the international bestsellers of the *management gurus* whose books occupy the largest spaces in the study programs and classrooms of Latin American universities.<sup>9</sup>

In all these writings, we can find a stereotypical version of the American businessman: Caucasian, male, liberal, upper class and heterosexual (Mills and Hatfield, 1998). There is no place for different ethnicities, races, genders, sexualities, classes, political positions or religious faiths (Cal’as, 1992). Indigenous, black, mestizos and other races, so central to understanding our region, are excluded.<sup>10</sup> Specifically, any successful example of prehispanic management still in existence as much as any current case of local business success is totally ignored or hardly documented (D’avila, 1997: 583; Osland et al., 1999).

We may add to this the case study method popularized by Harvard Business School; the use of movies and videos produced in the Centre to define otherness in a ‘convenient’ manner (Jack and Lorbiecki, 2003: 220, 225); the use of different kinds of business simulation games for management training; and, recently, the use of web-based educational platforms and software related to certain types of technology (Gopal et al., 2003: 238) in order to impose a highly

competitive individualist education that aims at creating the future ‘entrepreneurs’ (Alvarez, 1996).

The cumulative effect of these knowledge devices results in the construction of an imaginary world in which the ‘other’ is reinvented. This is done by imposing types of knowledge that reinforce the colonial difference. They tell us who we are, how we live, and why we are what they tell us we are (Priyadharshini, 2003). The coloniality of knowledge is a means of control that disguises Latin America’s subordinate condition in order to guarantee its silence, as if almost forced to accept the image of itself which it sees in the mirror of its masters.

The conservative spirit of the university has facilitated this falsification and transfer of Organization Studies. It has been used to reproduce the hegemonic forms of knowledge, legitimate because of their so-called ‘scientific validation’. It should also be pointed out that Latin American universities were created in order to encourage modernization (Ibarra-Colado, 2001). When they adopted the structure of the universities of the Centre, they guaranteed their functionality as extensions of internal coloniality (Lander, 2004: 171). The object of this coloniality is to turn us into ‘moderns’, that is, to detach us from our Latin American condition and from our capacity for autonomous thought and remake us into fake citizens of the world represented by the stereotype of the international American businessman.

Research has followed a similar path. It has developed through the falsification and imitation of the Centre’s organizational knowledge. Initially, Latin American researchers limited themselves to mainstream theories and methods taken from the Centre in order to replicate their findings in ‘tropical’ environments.<sup>11</sup> This resulted in a paradox. Anglo-Saxon theories proved difficult to be empirically validated overseas and this challenged their scientific (i.e. universal) validity. To shore up the integrity of the knowledge from the Centre, ‘cultural arguments’ were introduced that suggested that the problem was to be found in the ‘anomalies’ of ‘underdeveloped’ societies, instead of in possible limitations (i.e. the ethnocentric rather than universal premises) of the Centre’s theoretical frameworks (Ibarra-Colado, 1985: 30–3).

Eventually, cultural arguments became a very important epistemic resource for internal colonization (Florescano, 1994: 65–7). They permitted drawing up classifications of differences between Latin America and the Centre, establishing a hierarchy that guaranteed relations of domination between the ‘developed’ and the ‘underdeveloped’. Cultural studies and anthropology were used to tag these differences. They put labels on the anomalies, patterns of deviations and so-called pathological characteristics. Moreover, they allowed other types of knowledge, such as economy, management and organizational knowledge, to be proposed as remedies (D’ávila, 1999, 2005).

Ironically, this cycle repeated itself in the 1980s when critical analyses in the field of Organization Studies became of interest in the region (Ibarra-Colado, 2005).<sup>12</sup> Latin American researchers adopted these Euro-centric critical theories which had been remodelled in Anglo contexts and incorporated similar topics and agendas that stimulated discussions internationally (Ibarra-Colado and Montaño, 1991a, 1991b; Prestes-Motta and Caldas, 1997; Caldas and Wood, 1999; Gantman, 2005). The influence of these approaches became widespread through the

consolidation of the first organizational research groups in the region and by the internationalization of the discipline (Ibarra-Colado, 2000).

In brief, the development of Organization Studies in Latin America can be understood as a distorted version of the functionalist or the critical thought of the Centre. It reveals the incompleteness and the impossibility of translating the diverse Anglo-Saxon approaches. Nevertheless, it has been the dominant mode of organizational knowledge creation in the region. Paradoxically, Latin American scholars often express the uncomfortable sense that such approaches do not really explain what happens in their countries, while acknowledging that these frameworks give them recognition in the international arena, which is another way to say that to be allowed in you must deny your own identity: 'To belong in 'the international community', you must speak the Centre's language, use its concepts, discuss its agendas and conform to the stereotype of the 'imperfect south' while keeping 'a polite silence' on the real causes of your problems.

This is a dramatic situation if we take into account the limited production of original ideas in Latin America. Until now, there have been no significant theoretical contributions or historical analyses that examine specific organizational problems in the region. Instead, there exists a cut-throat competition between Latin American researchers trying to make a name for themselves in 'international networks'. Governments and universities have contributed to this by sending a *native 'elite of promising adolescents'* (Sartre, 1965) to the United States and Europe so that they acquire the 'know how' of what 'being an academic' really means (Ibarra-Colado, 2001: 209–12). The aim is to assimilate these new intellectuals to the 'publish or perish' culture, to make them express themselves correctly in English and to publish in journals located in the Centre. The youngsters must observe, scrupulously, the rules of the game. They must consider, at all times, the costs and benefits of each step. When they return, pompous and arrogant, their task is to spread this 'new culture' among their colleagues in a renewed act of internal colonization. Thus, many Latin American researchers have had to sacrifice their own identity, and adopt a more acceptable 'global' one under the battle cry: *Citizens of the world forever, Latin Americans never again!*

### **From Organizational Artifice to Historical Complexities**

The scant interest that Organization Studies has aroused in Latin America also has to do with an absence of specific historical reference points, which have impeded giving meaning to the term 'organization'. Even though such a concept played a very important social function in the United States, it had no meaning for people and communities in Latin America. Modernization in Latin America has basically been understood as the incorporation of our countries into a world commanded and designed from the centre, and has relied on the formation of strong national states, which determined the course of economy and society through a combination of state corporatism and violence, instead of economic performance and technical rationalization.

Although this absence of historical meaning has prevailed in the conceptualization of 'organization', over the course of the last two decades, its

usage has been gradually reinforced by the adoption of market rationality in the region. Nonetheless, the concept has not worked in the same way everywhere. Its enticing capacity in the Anglo-Saxon world is associated with the possibilities that it offers to *naturalize* the market rationality. In contrast, this concept is insufficient in Latin America to understand the apparent politicization of economic life and the assumed bureaucratic pathologies that lead to informal behaviours not attuned to instrumental rationality (Duarte, 2006). At the same time, the concept has enabled the weakening of Latin American critical thought through the imposition of certain organizational perspectives that reduce problems to design and coordination deficiencies, thus denying the social and political foundations of these problems and the asymmetries which are then produced.

As an epistemic artefact, the concept ‘organization’ acquires its power from its characteristic ambiguity and neutrality, and from the technical (non-problematic) character that it gives to any organizational reality. It is *ambiguous* because it does not imply a specific meaning. This concept refers to almost anything. It is an idea that refers to a *nonexistent reality* and entails a framework of abstract concepts to represent causal relations (Barnard, 1948). The use of this word produced at least two effects. Firstly, it allowed introducing some convenient neutrality when it took the place of other terms, such as ‘corporation’, ‘monopoly’ or ‘bureaucracy’. Important sectors of society strongly questioned these words because of their association with the power of money and state actions; that is to say, because of the consequences that private accumulation and state intervention had on employment and citizens’ welfare. Thus, the nascent disciplines that would promote Organization Studies had to be careful not to appear as servants of power, nor employ terms that would undoubtedly compromise their declared objectivity. Their theoretical asepsis was an indispensable condition for combating any suspicions that could have brought into question the scientific nature of this set of knowledge and practical advises (Ibarra-Colado, 2000: 250–5).

Second, substantive differences existing between institutions as varied in nature and social function as business, school, university, prison, hospital, government agency, church or political party were eliminated by utilizing the sufficiently general and abstract concept of ‘organization’ (March and Simon, 1958). Reducing differences between these social spaces to the behaviour of generic humans and certain structural variables in relationship with various environmental factors, accomplished the redefinition of substantive differences into equivalences and comparisons. Relying upon absolute *faith* in positive science, speculative approximations transformed into ‘discovery’ of determining universal relationships, which would then permit the experts to establish the most appropriate structural design for the organization to achieve a perfect match with its environment (Pugh and Hickson, 1979).

The study of organizations and the examination of their structures and management have been generally considered *non-problematic*: organizations are structured and function under instrumental rationality, so individuals interiorize as *normal* some work routines and rules of conduct that make it difficult to appreciate the phenomenon in any other terms. For these reasons, organizational problems are immediately assumed to be ‘essentially technical’, which ‘experts’ should

properly solve. Because we have become accustomed to live under their mandate, we forget too easily that the operation of organizing and governing, their rules and instrumentation, has serious practical consequences. They are disciplinary mechanisms producing certain effects that promote specific forms of social distribution. Yet, by appearing as natural or given realities current modes of organizing and governing are protected from social criticism, and thus are able to demarcate behaviours and mould identities.

The implications are obvious: a non-reflective approach to organizational problems lead to incomplete interpretations of social problems, to the tacit acceptance of the everyday realities in which we find ourselves immersed, leading us to the acceptance that nothing can be done. We have simply stopped asking ourselves if a different kind of existence is possible, one that might lead to norms of coexistence and mode of organizing based on alternative notions of rationality, distinct from those based on the market and economic exchange.

Further, through the terminological artifice represented by the term 'organization', and with the new language that emerged from it, the modern corporation recuperated its social legitimacy to the point of becoming the exemplar to follow in all modes of organizing. Thus, the corporation's economic success and their impressive technological contributions to society projected itself as the preferred laboratory for organization experts; their task was to 'discover' the 'universal principles' of structural design and management that would guarantee the rational operation of any formal organization.

It was this structuralist vision that synthesized the ambivalences of modernity into the progressive bureaucratization of the world and, concurrently, into the growing dissemination of a market-based rationality (Du Gay, 2005; Ibarra-Colado, 2006). The tensions between general regulation mechanisms and freedom of exchange prefigured a new landscape: a world dominated by an institutional isomorphism in which organizations are committed to be free, so they will be paradoxically captive of the market. The modern world has become an enormous institutionally regulated market, which over the course of the last century gradually incorporated institutions created by the State to preserve the unity of society and to protect public interest (Hodge and Coronado, 2006).

However, this capacity to reduce complex social realities to statistically validated causal formulations has been successful only within the limits of 'what is modern'. The 'organization' concept has not been useful to explain other non-modern social experiences that escape the ambiguity and neutrality of this abstract term, unable to acknowledge the social and political essence of the way the existence of human communities are organized. Such experiences are deeply rooted in peoples and communities of Latin America, many of them still in view. We are thinking, for example, of modes of organizing that date back to Pre-Hispanic times, such as agricultural production in communal lands or '*chinampa*' (riverboat) crops, which have shown high yields, optimum use of resources, and high adaptation capacity to environmental conditions. Their success has relied on several centuries of non-scientific know-how, that is, on practical knowledge and on the accrued experience derived from ongoing dialogue with nature, resulting in rituals and

beliefs that turn labour into an activity that goes beyond the simple logic of accumulation.

Other forms of division of labour and trade specialization, activities, and knowledge are practiced, but these also involve reciprocal collaboration and obligations to participate in moments of coexistence associated with rites and celebrations. The role of the *prestige-oriented economy* is essential to reinforce the solidarity bonds, even though it is generally described by the modern subjects as irrational, as they state that money is spent on useless festivities instead of investing it to increase their capital. Equally essential in these contexts is the organizational role of the family, the neighbourhood (*calpulli*), and the city; the economic and social role of street markets and fairs; and others ways through which education (*tehpochcalli* and *calmecac*) and health are organized (Bonfil, 1996; Escalante, 2004). Also worth mentioning are the farms or haciendas, typical forms of economic organization in the Spanish colonial system still prevailing in our days, and several forms of community associations, like cooperatives or voluntary work. Organizational advantages of these experiences merit analysis because they help reveal alternative modes of rationality, showing that the world is not simply comprised of ‘modern organizations’ founded on the ‘one best way’.

Then, it is obvious that scholars of Organization Studies in Latin America must break away from those abstractions implied by the ‘organization’ artifice of ‘the modern’ if they are to recognize the specific modes of organizing of their countries and the modes of rationality that undergird these. In other words, rethinking Latin American organizational problematic nowadays, implies the necessary historically and culturally delimitation of our approach. It is necessary to recognize the systematic neglect of local knowledge by institutionalized knowledge. What I want to emphasize is that Latin American societies may be one thing in their resounding discourses and in the appearance of their articulated power, but they are a very different thing in the silencing of their everyday practices and of their strategies of resistance. For all these reasons, it is necessary to reconsider the organizational realities of this region from within the tensions between its imagined modernity supported by power and its submerged non-modernities constituted through the life of its communities (Bonfil, 1996; García-Canclini, 1995).

This discrepancy emphasizes the great diversity in Latin American countries, and the contrast between the presence of high technology enclaves or niches that respond to that new integrative geometry of the global world, and the many non-modern spaces which protect themselves from these integration processes through the fortitude of their community’s local organization (Calderon et al., 1997). Latin American is a mosaic of diverse societies marked by deep contrasts and inequalities never totally or adequately acknowledged. Such societies are organized attending to particular space-time codes enabling the coexistence/confrontation of high modernity with non-modern spaces politically controlled. The tensions that result from this *dialogic* are associated with the speed inherent to each one of these contrasting social spaces, and the confrontation of very different rationalities. For example, the contrast between the stopwatch of the factory and the bells of the church that call to the festivity of the patron saint of the

community exemplify these tensions. As such, space and time are thus organized in accordance to very dissimilar material, symbolic, and imaginary codes.

The essential question that emerges is about the place modern organizations may occupy within this historical and cultural spectrum as a result of the tensions between at least three different spaces of existence: (a) leading social sectors that follow the rhythms derived from needs pertaining to the new global circuits of exchange; (b) other social groups, attached to a bureaucratic modernity never fully established in our countries, that subvert formal authority and rules through the resistance of informal practices; and (c) some communities that live within the confines of their localities and represent the vast non-modern spaces of the region.

The tensions that cut across these three spaces of existence situates different modes of organizing at the centre of social disputes from which contrasting and clearly divergent development models are imagined and impact the relationships between hyper-modern, modern, and non-modern spaces. Hyper-modernity naively tries to modernize the others, subjecting them to its own rationality or keeping them in the subordinate position that they have, but never allowing them to be the way they are. Under this logic, non-modern spaces have to be modernized, while modern spaces would have to be hyper(post)modernized.

In short, as illustrated through this discussion, it is essential to emphasize the importance of historical and cultural formation of local realities in the context of globalization and to incorporate a greater complexity in theoretical debates if we are to escape the established spaces of knowledge, controlled by an Anglo-Euro-Centric vision that assumes an *a-priori* and fully installed modernity from which we are supposed to think (Lander, 2002). If we accept that Latin American realities bear a historical and cultural complexity that escapes the illusions of this modernity, then the Anglo-Euro-Centric narrative becomes insufficient and useless: in the best of cases, the knowledge unfolded from the centre might help us acknowledge some of the traits of the niches of modernity (the centres of the peripheries), but at the cost of adulterating the non-modern essence of vast spaces of human existence in the region (the peripheries of the peripheries).

Thus, reorienting modern organizational knowledge, provincializing it as the Anglo-Euro-Centric (rather than 'universal') narrative that it is, turns out to be essential to clarify current relationships between globalization and localization processes. This interplay of integration/polarization, in its apparent nonsense, interweaves the rationality of the globalization of modernity, locally expressed, with very diverse local rationalities. These localisms attend to historico-cultural formations, the world over, sustained by imaginaries dense in myths and beliefs that articulate the magical and the religious with the communal and the collective, and grant to these articulations consistently different meanings in the contexts of diverse material existence.

## **Organizational Problems in Latin America: A Preliminary Research Agenda**

The definition of research agendas for Organization Studies in Latin America is therefore closely associated with the conditions under which modernity has been imposed and with the impact of processes of global integration in the geopolitical reconfiguration of the world. The generalization of neo-liberalism has thrown old local problems into the global sphere (Chossudovsky, 1997), revealing that problems originally present only in the periphery are now current realities also in the centre, though very important differences of degree and meaning continue to prevail. Despite these parallels, thinking of problems of organization from the centre or from the margins remains distinctive. One fundamental difference stems from the sort of views that might emerge by considering similar problems from different places. Thus, for example, poverty, which has always existed in Latin America, is understood quite differently from the territories of the centre, where it appears under the heading of the ‘new poor’ and ‘defective consumers’ and as an effect of the insufficiencies of a highly questioned economic framework (Bauman, 1998a, 1998b; Forrester, 1999). In Latin American countries, in contrast, problems such as these refer to hidden processes of abuse and exploitation, and to economic relationships between nations that ensure and reproduce subordination and unequal exchange.

Nonetheless, the translations that some Latin American scholars make of certain Anglo-Saxon critical perspectives appear insufficient for considering these variations. Although these approaches critically evaluate modernity, they always do it from the positions of power that they occupy sustained by their condition as ‘knowledge of the centre’. From its Anglo-Euro-Centric tradition, they are unable to deal with the provincialization of the Centre (Dussel and Ibarra-Colado, 2006), or to understand those different realities that do not function as their narratives prescribe. Moreover, and generally speaking because there are always relevant exemptions, these approaches are not really interested in other realities but their own.

As Latin American scholars, we must abandon this tradition of falsification of Anglo-Euro-Centric knowledges, regardless of perspective, and recognize our position in the outside-the exteriority of modernity- to think otherness from the margins. From here, it may be possible to recognize the dark side of our current modes of organizing, no longer as defective forms in ‘immature’ societies, but as the concrete expression of the exercise of the coloniality of power. Such a move may be in fact the beginning of productive dialogues and conversations between scholars of the Centre and the margins to elucidate the current nature of modernity and globalization.

### **A Preliminary Research Agenda**

Organization Studies in Latin America, from this perspective, acquire a new meaning: it is more than simply heeding to the problems of modernity as they are expressed locally and designing ‘tropical solutions’ that lead to our further resembling the centre. Rather, the discipline should recognize the problems in local realities produced by an imposed modernity that in itself may never reach the point

of its fulfilment. It is not about grading the roads of modernization in order to promote bureaucratic order and the functioning of markets, but rather studying the consequences of such bureaucratic order and the institutions of the market in realities historically constructed under different modes of rationality, always pressed by colonial domination. As a starting point for a research agenda with this orientation, let us establish three substantive questions whose answers would give it original meaning and *raison d'être* to Organization Studies in Latin America.

### **1. What Has Modernity Meant for Latin America, in Terms of**

**Organizational Problems?** This refers to the effects of technical rationalization and modernization in historical spaces constructed under modes of rationality based on communal organization and solidarity. There are people and communities in Latin America that do not find their principal *raison d'être* in economic exchange; thus, imaginary realities arise that produce a persistent confrontation between the modern and the no-modern.

Such issues are increasingly relevant to the extent that neo-liberalism imposes a mode of rationality based on the market, thus leading to the rise of tensions and contradictions between economic behaviour and people's modes of existence. They are also relevant to the extent that indigenous peoples have begun to make their voices heard, vindicating their own modes of existence and organization and their original rights to land and nation (Vodovnik, 2004). A perspective such as this helps us recognize the specific rationality of actions that are defined by the centre as aberrant behaviours, for they do not obey the logic of modernity. Likewise, it would permit understanding why Latin American countries have not been able to demonstrate 'successful' experiences in the global economy and, consequently, to value alternative strategies of insertion in modernity's landscape. These strategies of insertion are likely to be based on advantages derived from historical and cultural richness, from 'the *mestizo* sum of contributions, encounters, assimilations, metamorphosis' (Fuentes, 1997: 93) present in the region.

### **2. What are Main Social Organization Problems of Concern in Latin**

**America?** Even though the centre has, for some time now, been characterized by structuring social organization through economic rationality and the market imperative and the logic of work and accumulation, in Latin America, many limitations exclude the majority of the people from accessing work and general well-being (Cortés et al., 2002).

Under neo-liberal regimes, the reform of the State and the dismantling of their social institutions has brought into the limelight concerns regarding the way to organize health care, education and housing. It has also highlighted how to attend to problems such as poverty reduction, informal economy, migration, social violence and crime. There is enough evidence about the limitations, distortions and even the failure of solutions based on the transfer of organizational models from the centre. Processes of privatization, deregulation and economic openness have sharpened social problems, leading to an increase in inequality and exclusion in the

region (Ibarra-Colado, 2006). Organization Studies in Latin America should attend to these problems and their implications based on a distinct project that, without disregarding possible contributions and benefits that it may obtain from modernization, recognizes nonetheless the uniqueness of developmental possibilities for the region. Under these circumstances, consideration of alternative modes of organizing acquires further urgency.

**3. How Should We Interpret Labour Issues and So-Called ‘Postmodern’ Forms of Organization in this Region?** While Latin America is part of modernity, it is an *unaccomplished modernity* in that there is production of effects that escape the logic of technical rationalization and the operation of markets. This condition allows to understand why Latin America is a good example of hybrid realities in which the most advanced spaces, economically and technologically speaking, coexist with the most offensive and intolerable backwardness.

The implementation of flexible and participatory forms of work within performance-based remuneration schemes find their counterbalance in the despotic organization of large masses of deprived people who ‘choose’ precarious work within highly hierarchical and centralized structures as their best option. For the not so lucky, almost the majority, no option remains other than migration, unemployment or delinquency. In interpreting these great contrasts, one should keep in mind Latin America’s modes of insertion into the supposedly global world, organized through a framework of international division of labour that reproduces inequality and subordination.

These three general questions roughly delineated, and their possible answers, are barely a provocation to show the necessity to rethink the consequences of modernity and their effects upon realities created through the confrontation between diverse world-views. The tensions between the project that is imposed from outside and the practices, modes of existence and organizational forms that emerge from the most profound depths of our cultural history make Organization Studies in Latin America into a completely new project. To take it on implies abandoning the safe space where ‘practices of falsification of knowledge of the centre’ reside, and to risk ‘thinking as other’ in order to appreciate those submerged realities that have been hidden for so long by the narratives of modernity.

### **Some Contributions to Recreate our Dialogues and Conversations**

We have argued for the need to think in terms of ‘otherness’. It seems of utmost importance that we move towards a different modernity: one that does not rely on totalitarian models or a single ideology. The articles collected in this issue recover this intention to discuss, from diverse angles and places, the complexity of organizational problems.<sup>13</sup> This array of voices, selected from presentations at the 2003 APROS conference in Oaxaca, Mexico, is just a sample of the dialogues and conversations that the *Asia-Pacific Researchers in Organization Studies* (APROS) has stimulated. The ‘A’ in APROS is polysemic; it had its origin in Australia. Later it

included Asia and the Americas. Thus, one of the tasks of this group has been to analyse organizational problems from different places in order to show the importance of geographical space and otherness. In this sense, APROS could stand for *Action, Politics and Research for (an)Other Society* because it reveals the existence of different voices aimed at understanding and transforming the world.

In *Globalization, Organization and the Ethics of Liberation*, Enrique Dussel, in a version of his plenary session at the APROS conference, invites us, as historian and philosopher, to think of the concept of Modernity and its future. He does so by discussing the meaning of 'Globalization' when it is set against a critical attitude towards Euro-centrism. His intention is to foment a consideration of the factors that might lead us to a better world in which all can coexist. The respect for and the defence of life, as stated by Dussel, is the *main* material principle from which we can lay the foundations of a new reality. This should include the best of the modern technological revolution (rejecting that which is anti-ecological and exclusively Western) and put at the service of differently valued worlds. This project goes beyond modernity to the recognition of diversity. It is a wager in favour of a new *transmodern* world where each community decides on its form of existence in respect for others.

When considering 'otherness', we open ourselves to the appreciation of the rationality of local behaviours. These would otherwise be excluded using the simplistic formulae that confront the 'normal' to the 'pathological'. For those whose only strategy is rational calculation, such behaviours are incomprehensible. In *Exploring the Interpersonal Transaction of the Brazilian Jeitinbo in Bureaucratic Contexts*, Fernanda Duarte shows that the functionalist positions are unable to take into account the way that local communities devise forms of resistance. These communities wish to confront and elude the formal rules of bureaucratic structures and the pressures of competitive rationality and individualism that the market imposes on societies that have often worked under schemes of solidarity and collaboration. The analysis of *jeitinbo* in Brazil, and other forms of undercover action in different countries of Latin America, contributes to understanding the intimate relationship between local informal behaviours and organizational methods based on instrumental reasoning.

Bob Hodge and Gabriela Coronado's contribution opens another variation on the theme of coloniality. In their article *Mexico Inc.? Discourse Analysis and the Triumph of Managerialism*, they analyse the different ways in which governments have adopted the characteristic discourse of business. Furthermore, this discourse is translated into political documents that orient government action. As the paper indicates, modes of rationality based on the market have found their conditions of existence in such discourse. These seek to reinvent local practices by modifying the meaning of the institutions in the social imaginary. However, such discourses and practices are opposed by informal behaviour, which uses its own practices and discourses to resist: disobedience and sarcasm hide behind the serious face of the worker who responds 'yes sir' to any given orders when, in fact, he is refusing to cooperate. The gap between the modernization programs and their fulfilment finds

its explanation in the tensions that exist between the discourses of power and the practices of resistance.

Under premises of globalization, there have been many significant modifications in relationships between firms. These have given rise to different organizational arrangements in the areas of production and regional trade. As shown by Dennis McNamara in *New Places But Old Spaces: Knowledge Hierarchies among Asian Small and Medium Size Enterprises Abroad*, small and medium size enterprises play a crucial role in Southeast Asia regional production. However, the long-term viability of these firms depends on processes of learning and innovation generally controlled by larger firms. Hence, networks of ‘collaboration’ are imposed. These establish hierarchical relations based on the control of knowledge and impede the utilization of the learning advantages that these new localities offer. McNamara questions the supposed benefits of this model of integration, remarking that it does not allow a dynamic and favourable atmosphere for local development. This facet of the processes of global integration reveals, from its asymmetries, the political nature of economic relations.

Finally, in *Connexions*, Fernando Leal puts civil society as the central point of his paper, recognizing several of the organizational forms that have recently been adopted. The arguments of *On the Ethics and Economics of Organized Citizenship* are supported by a set of dramatic cases taken from the actions of non-governmental organizations. These show how such organizations cannot be considered a priori as beneficial to humanity. Furthermore, the actions of these organizations generate problems that must be analysed within their specific circumstances, taking into account the social effects they produce. Such examples present themselves as small-scale case studies of philanthropic organizations that could lead to future research concerning larger scale actions and civil choices.

Thus, APROS and *Organization* lead a joint effort in this issue and offer spaces where many of the points raised above find resonance. These are spaces for thinking the world from a dialogical point of view and from otherness. Spaces such as these are required for the recreation of an Organization Studies focused on the transformation of the planet and its maladroitness, where the expression of different points of view may produce a global concert that simultaneously respects differences and opens the doors for everyone. Is this possible?

## Notes

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<sup>1</sup>When combing through the *Social Science Citation Index*, we found that Sartre had been quoted on 102 occasions and Fanon on 1244. However, on analysis, none of these references were to be found in journals of the field of Organization Studies, except for one paper by Albert J. Mills (1995) which referred to Fanon.

<sup>2</sup>We are currently working on a research project to clarify the condition of Organization

Studies in Latin America. This research includes an analysis of the institutional structures of the discipline in Brazil, Argentina, Mexico, Chile, Colombia and Venezuela. We analysed the academic programs, journals, conferences and the size and degree of consolidation of the academic communities. In addition, we considered the inter-institutional relationships of the countries and regions and the international disciplinary networks related to this field. In the near future, interviews with recognized researchers will be carried out in each of these countries to complete the information required. For the time being, two things are evident. First, despite the great differences between the countries, they have a lot in common when it comes to epistemic coloniality. Second, Brazil is *sui generis* due to its early incorporation and institutionalization of the field into its academic system. Moreover, it has acquired valuable experience during 50 years of investigation. The reader should consider these facts in order to interpret adequately the statements made in the text.

<sup>3</sup>The colonial difference means "...not only that people in the colonies are 'different' but that they are 'inferior' and need to be 'civilized', 'modernized', or 'developed'" (Mignolo, 2003: 107).

<sup>4</sup>We are dealing with a very complex issue that has many facets and cannot be resumed in a few pages. Lack of space makes it difficult for us to give more information or include the extensive bibliography we have used. Thus, we limit ourselves to giving only the most significant references.

<sup>5</sup>Among the most usual publishing houses of management textbooks in Latin America are McGraw-Hill, Person, Harla, Addison-Wesley and Oxford University Press. Recently, there have been some processes of integration and fusion that reinforce the control of the market. The local publishing houses have been increasingly articulated to these big overseas corporations, so they function mostly as subsidiaries that follow the priorities established in the business centre.

<sup>6</sup>Examples of some of the authors of the most used textbooks in management are Harold Koontz and Cyril O'Donnel, Harwood Merrill, Claude S. George, Robert Dubbin, Philip Kottler, Richard L. Daft, James Gibson and Stephen Robbins.

<sup>7</sup>The most well-known Latin American author is Idalberto Chiavenato. His book *Introducción a la Teoría General de la Administración (General Theory of Management: An Introduction)* was published in 1976 and represents an exemplar case of the falsification tendency already noted (Chiavenato, 2005). In addition, in each country of the region, it is easy to find textbooks of doubtful quality; they are bad copies of some of the originals of the Centre, full of mistakes, vagueness and without any academic rigor. However, there are other books by Latin American authors with a more independent and reflexive position. Among them, we should mention, for example, Bernardo Kliksberg, Oscar Oszlak, Jorge Etkin and Leonardo Schvarstein in Argentina; Eduardo Ibarra-Colado, Enrique Cabrero and David Arellano in Mexico; Carlos Osmar Bertero, Carlos Bresser-Pereira, Miguel P. Caldas and Fernando Prestes-Mota in Brazil; Carlos D'ávila in Colombia; and Jorge D'ávila Hernan Lopez-Garay in Venezuela.

<sup>8</sup>A significant example can be found in the *Latin American Council of Management Schools* (CLADEA in Spanish), created in 1967. This Council integrates more than 100 schools of the region, whose profiles demonstrate the tendency already noted. In addition, a detailed analysis of this Council reveals the ways coloniality operates, despite its discursive strategy.

<sup>9</sup>Among the most popular management gurus in the region are Michael Porter, Peter F. Drucker, Tom Peters, Stephen Covey, Peter Senge and Warren Bennis.

<sup>10</sup>There are approximately 40 million indigenous people and over 400 different ethnic groups in Latin America. Black people and mixed afrolatin and afrocaribbean groups make up a population of over 150 million. These groups have traditionally been excluded and are still facing the most difficult problems of poverty, discrimination and segregation (Hopenhayn and Bello, 2001).

<sup>11</sup>Although a complete diagnosis is still lacking in Latin America (Bertero et al., 1999; Ibarra-Colado, 2005), a cursory revision of the content and orientation of some of the journals published in the region made it possible to confirm the existence of falsification, imitation and replication. See, for example, many of the issues available on the Internet of such journals as: Academia (CLADEA), Administracion y Economia (Chile), Administracion Organizaciones (Mexico), Estudios de Administracion (Chile), Estudios Gerenciales (Colombia), Gestion y Estrategia (Mexico), Gestion y Politica Publica (Mexico), Revista de Administração de Empresas (Brazil) and the Revista Venezolana de Gerencia (Venezuela).

<sup>12</sup>This second cycle can be seen when local publications reprint the critical authors of the Anglo-Saxon world. It can also be recognized in the critical orientation of some groups, conferences and publications of the region. Some examples can be found in the *Meeting of Organizational Studies* (EnEO in Portuguese) that has organized the *Grupo de Estudos Organizacionais da Associação de Pós-Graduação e Pesquisa em Administração* (Brazil) from 2000 onwards. There is also the *Organizational Studies Research Group* of the UAM-Iztapalapa and, currently, the *Department of International Studies* of the UAM-Cuajimalpa (Mexico). In Venezuela, the *Research Centre on Interpretive Systemology* of the University of the Andes also has an interesting approach.

<sup>13</sup>The preliminary versions of such texts were presented in the *Tenth International Congress of the Asian Pacific Researchers in Organization Studies*, celebrated in the city of Oaxaca, Mexico, 7<sup>th</sup> to the 10<sup>th</sup> of December 2003. Enrique Dussel gave the inaugural conference. I worked on the transcription, restructuring and edition of the text, giving a new form to the main ideas of his presentation. This was a difficult task because it implied an interpretation of the sense of the author's words, deciphering the game of sounds and images on the video. The author then revised the final version.

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