



Critical Management Studies in the South African context



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*I won't be coming home tonight
My generation will put it right
We're not just making promises
That we know, we'll never keep.
Too many men
There's too many people
Making too many problems
And not much love to go round
Can't you see
This is a land of confusion.
Now this is the world we live in
And these are the hands we're given
Use them and let's start trying
To make it a place worth fighting for.'*

- Genesis: Land of Confusion

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Research Justification

The purpose of the book is to establish the first formalised scholarly work on critical management studies (CMS) in the South African context. The book is a collection of seven chapters, six of which employ a conceptual methodology and one of which follows an interpretive paradigm employing qualitative methods of inquiry. CMS is a relatively young school of thought, arising in the early 1990s and still very much being a peripheral movement within the academic discipline of management. South Africa has very little scholarship on CMS as precious few scholars work in this space. Furthermore, publication opportunities are virtually non-existent as CMS is virtually unknown in the South African community of management scholars. Thus, this book represents the first academic work on CMS published in South Africa, written and reviewed by scholars who are familiar with the field.

The primary target readership would be management academics, but it could also be a useful reference for postgraduate students in management.

A digital similarities index report confirms the originality of the work and that it has not been plagiarised or published elsewhere.

Prof. Dr Andries G van Aarde
AOSIS Chief Editor: Scholarly Books

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Abbreviations appearing in the Text and Notes

AltX	Alternative Exchange
CMS	Critical Management Studies
CTA	Certificate in the Theory of Accounting
DHET	South African Department of Higher Education and Training
GIS	Geographical Information Systems
HRM	Human Resource Management
JK	Just-in-Time Knowledge
KIEHRA	Information Economics/Human Resources Research Agency
OVS	Orange Free State
PRME	Principles of Responsible Management Education
RAU	Rand Afrikaans University
SABPP	South African Board of People Practitioners
SAIMS	Southern Africa Institute for Management Scientists
SAJHRM	South African Journal of Human Resources Management
SAMP	South Africa Management Project
UJ	University of Johannesburg
UKZN	University of KwaZulu-Natal
UNISA	University of South Africa
UTLO	University Teaching and Learning Office

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Foreword

For many management academics, critical management studies (CMS) is virtually unknown. If I look at my own academic journey of more than 20 years, CMS was something I was only exposed to about four years ago. Yet, I believe it is an underexplored area of inquiry within the broader academic discipline of management, and it is certainly an area that warrants deeper investigation.

In many respects, CMS can be seen as a new kid on the block with the seminal article of Mats Alvesson and Hugh Wilmott published in 1992 representing the first work around which a critical scholarly mass gravitated, which today is termed CMS. However, CMS does not represent a singular thesis. Instead, it can be seen as an umbrella term that incorporates many points of view with the common denominator of challenging mainstream convention and striving toward radical transformation. By so doing, CMS might not always present concrete answers but rather poses many questions for management academics to consider, which resonates with Immanuel Kant's notion that '[t]he world appears to me through the questions that I ask.'

It is encouraging to see that, even at the southern tip of Africa, the seed of CMS has been planted. This book represents the current state of CMS in South Africa. We acknowledge that this attempt to establish something concrete in terms of CMS in South Africa might not necessarily conform to the purists' conception of CMS. Nonetheless, as a team of authors, we are quite proud of this book as it represents the first formalised work on CMS in South Africa. It also represents the South African internalisation of CMS, exhibiting the issues with which we as South African management scholars are grappling and indicating where we think CMS can help in redefining these issues as we head towards an increasingly uncertain future.

We hope that this book will incite debate and discussion and create further awareness amongst South African management academics regarding the purpose and place of CMS within the broader academic discipline of management. We realise that the radical, and often cynical, position portrayed by CMS will not find favour with all, but we hope that readers will appreciate that we often need to ask difficult questions and enter into uncomfortable discussions in an effort to be geared for a future where it will most definitely not be 'business as usual'.

The economic difficulties facing not only South Africa but the world as a whole in the wake of the 2008 financial crisis and the calls for the decolonisation of the curriculum by student organisations as part of the #FeesMustFall movement are but two instances that illustrate that the scholarly endeavour of management in South Africa is on the verge of entering a new era and that we need to cast our nets wider with our scholarly endeavours. We are of the opinion that CMS can offer us a new lens through which to prepare for the challenges that await us. Transformation is a reality from which we cannot hide in South Africa. It is a multifaceted and complex issue that cuts through every sphere of our society, including the academic discipline of management. There might not be immediate answers, but a good starting point is to problematise the burning issues, and it is our firm belief that CMS is the perfect mechanism through which to do this.

I have been fortunate enough to be a product of the 1980s. I embraced the very ethos of the decade, and to a certain degree, I am still stuck in the 80s. The 80s generation is one that broke the mould of convention. They constantly challenged and asked 'Why?' They were never satisfied with 'this is how it has always been done.' This, to me, lies at the very heart of CMS. In the true spirit of the 80s, I wish to end off with an extract from *Genesis - Land of Confusion* (1986), which (purely coincidentally) was playing in the background when I started writing this introduction:

I won't be coming home tonight

My generation will put it right

We're not just making promises

That we know, we'll never keep.
Too many men
There's too many people
Making too many problems
And not much love to go round
Can't you see
This is a land of confusion.
Now this is the world we live in
And these are the hands we're given
Use them and let's start trying
To make it a place worth fighting for.

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Part 1

Theoretical perspectives

On the possibility of fostering critical management studies in South Africa

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■ Introduction

The objective of Chapter 1 is to introduce the emergent paradigm of critical management studies (CMS) to South African business-management academics with a view on interrogating specific applications of CMS in the discourse of business management in South Africa. To pursue this aim, CMS as an emerging paradigm will be expounded upon, and its applicability to the South African context will be explored. Chapter 1 follows a critical dialectic

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engagement with literature and personal experience as an academic with more than 20 years of experience in the field of business management. The inquiry was sparked, in part, by conversations with peers on the seeming inefficiencies and areas of privation of current, mainstream methods of inquiry into business management and an openness amongst some academics to explore avenues of thought that challenge mainstream convention.

The South African academic community (at least those that work in the space of business management and related disciplines) seems to be heavily stooped in the positivist tradition, which has certain consequences. Firstly, positivists are driven by the notion that science can produce value-free, objective knowledge through the removal of subjective bias and non-rational interferences (Alvesson & Deetz 2000). This objective knowledge, in turn, forms a legitimate basis for the business organisation and the management of people in accordance with scientific principles (Adler 2002; Adler, Forbes & Willmott 2007; Fournier & Grey 2000). A disconnect is apparent when science becomes removed from the essential task of developing and shaping society and instead focuses on the application of science to maintain a current order (Adler *et al.* 2007).

The modernist tendency is to justify value commitments through reference to the authority of science, which denies the practical embeddedness of science within certain frames of reference (Alvesson & Willmott 2012). It is important not to confuse this notion with the practical applicability of individual research endeavours. The question is whether this scientism actually strives for betterment of

society or for the maintenance of its own status quo. This means that knowledge claims arising from scientism are seen as authoritative and indubitable with scant (or indeed no) room for reflection on the outcomes of the applications of science (Alvesson, Bridgman & Willmott 2009; Alvesson & Deetz 2006; Grey 2004). Science thus gains a monopoly on the guidance of rational actions, and all competing claims on a rational course of action are to be rejected (Westwood 2005).

The above is quite obvious when one reflects upon the emergence of interpretive scholarly inquiry and qualitative methodologies in the discipline of business management (and related disciplines) amongst academics in South Africa. It has only been since the turn of the century that qualitative work – and publications – has attained a critical mass. This by no means implies that qualitative and interpretive work has taken centre stage in South Africa. It is still very much a growing tradition with very few truly skilled academics operating in this space. This can be seen by the number of qualitative articles published in South African management journals compared to quantitatively orientated articles. A scan of three of the leading South African open-access management journals revealed the following proportions of quantitative versus qualitative articles for the 10-year period between 2005 and 2014.

Table 1 points to the dominance of quantitative methods – normally associated with scholarly work of a positivistic nature – in the scholarly endeavour of business management and related disciplines in South Africa.

TABLE 1: Quantitative and qualitative publication ratio in selected South African management journals.

Journal¹	Average quantitative articles 2005–2014 [%]	Average qualitative articles 2005–2014 [%]	Average ‘mixed methods’ articles 2005–2014 [%]
A	71.9	24.5	3.6
B	75.8	22	2.2
C	61.3	33.5	5.2

It is against this backdrop that the notion of CMS is explored. The endeavour is not an attempt to incite a revolt against more mainstream and established traditions that dominate thought, research and education within this academic domain. Rather, it is an attempt at creating awareness amongst South African management scholars as to the potential of CMS for providing insight into issues at which mainstream scholarly endeavour is limited. Thus, Chapter 1 sets out to explore how CMS can complement more established traditions rather than compete with them or negate them.

Chapter 1, firstly, gives a brief outline of the evolution of CMS as an emergent paradigm within the domain of business management. Thereafter, the nature of CMS as a school of thought is expounded. The discussion attempts to highlight the applicability of CMS to the South African context. Chapter 1 concludes by suggesting areas of inquiry that would be best suited to sense making through the application of critical-orientated methodologies such as CMS.

.....
 1. The names of the journals are withheld as the relevant editors’ consent had not been obtained. All these journals appear on the list approved by the South African Department of Higher Education and Training. One or more of these journals are also indexed with IBSS, ISI and Scielo SA.

■ The evolution of CMS

It is widely acknowledged that CMS originated with Alvesson and Willmott's seminal work published in 1992 (Grey 2004; Learmonth 2007), yet work displaying similar notions had already been done before the publication of Alvesson and Willmott's work (e.g. Anthony 1986; Clegg & Dunkerley 1977). The CMS label affirmed by Alvesson and Willmott's work acted as a sort of repository for inquiry with a critical orientation related to business management (Fournier & Grey 2000; Grey 2004).

Alvesson and Willmott (2012) indicate that the advancement of Western society has seen the emergence of two dominating forces, namely capitalism and science. The business organisation, as it is conceived today, emerged during the Industrial Revolution and can thus be seen as an instrument through which capitalist activity takes place (Goldman, Nienaber & Pretorius 2015; Westwood & Jack 2007). The Industrial Revolution also witnessed the advent of formal inquiry into business and how it is to be administrated or managed, as is evident, for example, from the rapid growth of Taylor's notion of scientific management in the early 20th century and the resultant burgeoning of business schools in the USA (Stewart 2009).

However, it was the same Industrial Revolution that also witnessed the first major critique of capitalism and the instrument thereof (referring to the business organisation) in Karl Marx's thesis of the class struggle (Alvesson & Willmott 2012; Sulkowski 2013). Although influential in shaping CMS, Marx's thesis is but one of many criticisms of capitalism, business organisations and the management of these business organisations. Indeed, influential

thinkers from the discipline of sociology (such as Durkheim and Weber) have been critical of capitalism and business organisation especially in terms of its propensity for exploiting human beings (Alvesson *et al.* 2009).

Contemporary CMS draws from, and builds upon, a wide array of traditions, and consequently, it is difficult to pinpoint an exact lineage or chronology of events that has resulted in contemporary CMS. It has been enthused by many scholars and traditions such as Marx, Weber, Foucault, the Frankfurt School, labour-process theory, moral philosophy, poststructuralism and postcolonialism (Alvesson *et al.* 2009; Dyer *et al.* 2014; Fournier & Grey 2000; Grey 2004). Despite these diverse and often differing points of departure, CMS thinking seems to converge in a conception that acknowledges management as a function of history and culture (Alvesson & Deetz 2006; Grey 2004). Subsequently, CMS has grown into a multidisciplinary, pluralistic tradition which can be (to those new to, or unfamiliar with CMS) quite confusing and which has endured its fair share of attacks in terms of its scholarly project (Alvesson *et al.* 2009). However, the binding force behind CMS seems to be the endeavour to strive for a less discordant, less oppressive and less exploitative form of business management practice within a more morally focused political economy (Adler *et al.* 2007; Clegg, Dany & Grey 2011; Dyer *et al.* 2014).

■ An attempt at defining CMS

Understanding exactly what CMS is, is tantamount to catching an eel with rubber gloves. The more one reads up on the issue, the more elusive it becomes. Any attempt to define CMS is fraught

with difficulty, and therefore, Chapter 1 does not attempt to put forward a working definition of CMS. Rather, different definitions will be interrogated to extract common themes from these definitions to describe the nature and characteristics of CMS.

Many authors point out that there is no singular definition of CMS as there is no singular set of parameters that accurately define it (Adler *et al.* 2007; Alvesson *et al.* 2009; Alvesson & Willmott 2012; Dyer *et al.* 2014; Fournier & Grey 2000; Grey 2004; Spicer, Alvesson & Karreman 2009). In its simplest form, CMS is (Parker 2002):

[A]n expression of certain authors' political sympathies, insofar as expressing sentiments that are, inter alia, broadly leftist, pro-feminist, anti-imperialist and environmentally concerned. These expressions also reflect a general mistrust of positivist methodologies within the broader realm of social sciences. The expressions mentioned manifest in an endeavor to expose moral contradictions and inequitable power relationships within the organisational context. (p. 117)

This broad sketch of CMS discloses that inquiry is dependent on the worldview of the person conducting the inquiry, that is, the researcher. Put differently, CMS requires a particular mind-set from the researcher. To be a critical-theory² scholar thus implies far more than being critical of the world around us and of objects of inquiry. The critical scholarly endeavour is one of a deep-seated belief in the fallibility of the mainstream (or dominant) understanding of the world around us, of the methods of inquiry used to develop this mainstream view and of the paradoxes created by this mainstream thinking (Adler 2002; Cimil & Hodgson 2006; Spicer *et al.* 2009).

2. Critical theory here refers to the tradition within which CMS is rooted.

Alvesson and Willmott (2012:19) offer the following insights into CMS: 'The critical study of management unsettles conventional wisdoms about its sovereignty as well as its universality and the impartiality of its professed expertise.' This excerpt highlights another important aspect of CMS: Apart from distrusting mainstream thinking, CMS challenges the political neutrality of mainstream or conventional wisdom (Alvesson & Willmott 2012). As an institution rooted within the mechanisms of capitalism, business management often assumes a position of being beyond refute. It also assumes an iconic status brought about through legitimisation on ontological, epistemic and moral grounds (Sulkowski 2013) as managers are seen as conveyors of management reality, and the managerial structure of a business itself is seen as the quintessence of expert knowledge on business management and as the instrument of justice and democracy in the workplace (Fournier & Grey 2000).

Thus, the techniques of business management have taken precedence over the politics of business management. This has resulted in the mainstream view that management entails techniques and processes that are symbolising neutral facts (Grey 2004). At its very heart, business management is a social endeavour, and as such, it is political because social practices and institutional relationships influence (to a lesser or greater degree) strategic decisions, operating procedures and business models (Alvesson *et al.* 2009). This social and political side of business management implies a value-laden reality (Clegg *et al.* 2011; Grey 2004). The mainstream obsession, therefore, with neutral fact has maligned the value-ladenness that should be associated with

business management as a social science. CMS does not wish to ignore the fact but rather promote the stance that facts are imbued with values.

A case in point could be a company's outlook on community development. Irrespective of whether the company in question takes this issue to heart and operates from a position of true commitment to the cause, or whether it is merely a public relations exercise to tick the appropriate boxes as far as social responsibility is concerned, a decision was made in terms of which direction this company should go. The decision to commit or comply is in itself a value judgement on the part of the decision maker.

Grey (2004) states the following:

[T]he field of management studies is already and irredeemably political, and the distinction between the critical position and others is not one of politicization but one of the acknowledgment of politicization. (p. 179)

This statement by Grey reflects the CMS position that business management (and other social sciences) cannot be neutral, despite efforts to appear so. More often than not, the practice and scholarly endeavour of business management is convened as a reality that consists only of its own activity, thus ignoring or denying the political activity of this reality (Knights & Murray 1994). By so doing, the act of management becomes an ideology that legitimises the use of power to rationalise the position of management (Sulkowski 2013). This ideology, then, contributes to the creation of identity and group solidarity. Harding (2003) attests that this ideology, referred to as managerialism, has created a huge system of the social legitimatisation of this power through institutions such as consulting firms, business

and management faculties, business schools and publications. The net effect of this encroachment of managerialism into societal bodies means that CMS, as a critique on managerialism, is not only the concern of practice and scholarly endeavour but also of education. Indeed, sprouting forth from the CMS tradition has been a specialisation concerning itself with critical management education (CME) (Clegg *et al.* 2011; Grey 2004; Learmonth 2007).

From the above, it is evident that CMS is a complex body of interrelated views. However, irrespective of the finer detail, certain commonalities are evident from the profusion of views concerning its exact nature. CMS thus:

- Relies on a disposition assuming the fallibility of mainstream convention on the part of the inquirer.
- Challenges the political neutrality of conventional business-management thinking and as such recognises that business management is a function of historical and cultural contexts.
- Accepts a value-laden reality and is sceptical of claims based entirely on the outcome of science at the expense of the values that underlie these claims.
- Is sceptical of the ideology presented by managerialism as this often legitimises practices that are morally questionable.

In summary thus, CMS requires a particular disposition on behalf of the researcher. It further urges us to see business management as part of a bigger whole, and it is weary of the exploitative potential of the commercial and managerial system.

■ Central tenets of CMS

In order to achieve the purpose set out in the previous section, CMS needs to rely on a set of guiding principles. Fournier and Grey (2000) provide a point of departure in this regard, stating that CMS takes the following position (also see Grey & Willmott 2005):

- It aims to *denaturalise*, that is, it interrogates notions of business and management that over time are taken for granted and are often legitimised as ‘the way things are’. Alvesson *et al.* (2009) employ the analogy of organisational hierarchy to prove the point. A person that occupies a higher position than others in the organisational hierarchy (the manager) is assumed to possess more knowledge and skills that are scarcer, which in turn legitimises their high level of remuneration as the manager has greater responsibility to bear. Such manifestations of an individualist possessive ideology are challenged by CMS, arguing that the locale within which management functions should not necessarily attest to such notions.
- It is *reflexive*, in other words, it recognises that all accounts of business management as an area of inquiry are advanced by the specific tradition to which its scholars ascribe. Reflexivity extends a particular epistemic challenge to logical positivism that seemingly pervades mainstream research in business management and related disciplines. CMS is sceptical of the possibility of neutrality and universality in business-management research, as such notions are (at least in part) seen as furthering a research agenda which ignores parochial theory-dependency and refutes the notion of perpetuated naturalisation. In an effort to generate

objective facts, mainstream business-management research discounts the values which guide not only what is being researched but also how it should be researched. Mainstream research represents weak (and often absent) reflexivity, and little attention is given by knowledge users to question the assumptions and routines upon which knowledge production is grounded. CMS views such critique as mandatory, not only of other traditions but more intensively of its own claims and how they are conditioned by context, history and culture.

- It takes a *non-performative*, stance. Alvesson *et al.* (2009) attest that business-management knowledge has value only if it can (in principle at least) be applied to enhance the achievement of existing outcomes. These outcomes are normally also naturalised notions. An anti-performative stance rejects the notion that knowledge has value only if applied and purports that new, denaturalised outcomes should be sought and that business-management knowledge should augment outcomes that do not promote the agenda of mainstream business-management thinking. Often, anti-performativity is construed by those not familiar with CMS as a rejection of any notion of having pragmatic value, thus reducing CMS to the realm of the esoteric and the cynical and isolating it as a negative practice. At its very core, CMS tries to evoke change as is typical of scholarly endeavour that proceeds along the critical-theory trajectory. By way of an example, consider business-management research conducted within indigenous communities in South Africa. Very often, such research aims to understand the nature of these communities (in terms of value systems, behaviour, et cetera) in an effort to adapt managerial practices to more efficiently and effectively manage

employees emanating from these communities. However, the conceptual flaw here, which the anti-performative stance attempts to address, is that at the very heart of such an endeavour is still an agenda of focusing on organisational goals and targets to pursue maximum productivity. An anti-performative stance would pursue a different agenda with such research. Typically, it would imply a movement away from organisational targets and outcomes whilst actively seeking alternative outcomes in fostering relationships between an organisation and its stakeholders. The question then becomes not 'How can the organisation better manage these stakeholders' but rather 'How can the unique stakeholder demands influence the organisation to foster better relations with these stakeholders for the benefit of all parties concerned.' Anti-performativity is a much debated issue within the CMS community with hard-lined proponents for and against it. The stance taken in Chapter 1 (presented above) is what Spicer *et al.* (2009) refer to as 'critical performativity', which is more of a moderate stance in terms of anti-performativity.

From the preceding discussion, it is apparent that CMS is a radical endeavour, which is often at the heart of critique against CMS. It would seem as though mainstream business-management thinking is so firmly entrenched in business-management scholars that the search for plausible alternatives seems a very daunting prospect. It is this dearth of any plausible and practical alternatives to the managerial project that seems to be a serious threat to the credibility of CMS as a movement.

Despite these sentiments, CMS forces business-management scholars to move outside of their traditional comfort zones. As the

basic point of departure in CMS is scepticism towards scientism and mainstream thinking, CMS scholars also tend to be sceptical of mainstream management literature and thus look at other bodies of literature to ground their work. Mainstream management literature tends to ignore points of view from outside the managerial project that deal with issues of organisation and management. A point in case is the work of Michel Foucault, whose thought is widely recognised in the area of industrial sociology. However, within business management and related disciplines, the work of Foucault is virtually unknown (Goldman *et al.* 2015).

Now that a broad exposition has been offered of what CMS entails, the discussion shifts toward the possible areas of application of CMS within the South African context.

■ The possibilities for CMS in the South African context

If one recognises the social and value-laden nature of business management, as well as the notion that mainstream business-management thinking is an extension of Western capitalism that has created a subversive power base that seeks domination and control to maintain the status quo and to suppress or marginalise divergent thought (Deetz 1995), then the potential of CMS to play a more prominent role in the discourse on business management in South Africa (and the rest of Africa, for that matter) becomes glaringly obvious.

A logical, yet underexplored, extension of CMS is the anthropologically imbedded discourse of postcolonialism (Westwood & Jack 2007).

The conception of postcolonialism is one of a ‘retrospective reflection on colonialism, the better to understand the difficulties of the present in newly independent states’ (Said 1986:45). As such, postcolonial inquiry seeks to thematise and challenge matters arising from colonial associations (Banerjee 1999; Joy 2013).

Although it has risen to prominence in recent times in the realms of the humanities, most noticeably anthropology, literary studies and history (Banerjee 1999; Westwood & Jack 2007), it must be stressed at this point that postcolonialism is fraught with ambiguity, both theoretically and politically (Kandiyoti 2002; Shohat 1992). Most noticeably, the prefix ‘post-’ signifies a state of affairs ‘after’ colonialism. However, there is no exact timeframe that denotes the end of colonialism and the start of a postcolonial order (Westwood & Jack 2007). In fact, in many postcolonial nation states, traces of colonialism still remain, but these are either disregarded or disguised as economic progress and development (Banerjee 1999; McKinnon 2006; Nkomo 2015). Through claims of prioritising the agenda of the marginalised and disenfranchised ‘other’ (Muecke 1992), postcolonialism tends to have scant regard for the present consequences brought about by colonisation. Through continuing disparity in power relations between ‘coloniser’ and ‘colonised’, pre-specified courses of action are imposed in the name of progress (Kayira 2015; McClintock 1992). The nett effect is that colonialism is perpetuated. Only now, it takes on an economic semblance rather than an imperialist one.

Another strong critique of postcolonialism arises from the assumption that all countries that were once colonised share a common past in terms of their contact with Europe (Banerjee 1999),

thus ignoring historical and cultural differences between different countries. This renders postcolonialism a culturally universal endeavour typified by singularity of thought and ahistoricity (Mani 1989; McClintock 1992; McEwan 2003; Prakash 1992; Radhakrishnan 1993).

Despite these points of critique against postcolonialism, many authors highlight the applicability of postcolonial inquiry to the realm of business management and organisation theory (Cooke 2003; Jack & Westwood 2006; Johnson & Duberley 2003; Westwood 2001), especially if one bears in mind that 'modern management theory and practice was also borne in the colonial encounter, founded on a colonizing belief in Western economic and cultural superiority' (Westwood & Jack 2007:249).

Jack and Westwood (2006) remind us that business management as a scholarly endeavour exhibits a strong continuity with the colonial project by striving for universality, the promulgation of the unity of science and the marginalisation of non-Western traditions through essentialising modes of representation offered under the auspices of legitimate knowledge. The result is that business management, as an intellectual and pragmatic enterprise, has lost its historical, political and institutional locations.

The South African context is one that exhibits a particular location in terms of culture and history as is the case with any other nation states that had fallen victim to colonisation. This location is not necessarily compatible with the location represented in the 'mainstream' conception of the intellectual enterprise of business management and organisation theory. Without embarking on a detailed discussion of South African history and the socio-cultural,

political and economic legacies that developed during this history, suffice it to mention at this juncture that South African history can be viewed as having four distinct eras.

The first of these four eras can be seen as pre-colonial. It is argued that *Homo sapiens sapiens* evolved in the southern part of Africa. Indeed, archaeological evidence from the Blombos caves in the Witsand area of the Western Cape province affirms the earliest 'jewellery' known, dated back some 75 000 years (Mellars 2007). By the 17th century, the region which is now South Africa was inhabited by various groups of people, most noticeably the Khoikhoi and San people in the west (Barnard 2007), the Zulu and Xhosa people in the east and tribes which would later be known as the Sotho and Tswana people of the central and northern regions (Shillington 2005).

The arrival of the Dutch on 06 April 1652 (Hunt & Campbell 2005) ushered in the era of colonialism in the region. Initially intended as a shipping station for the long sea voyages from Europe to the East (Comaroff 1998), the strategic value of the Cape of Good Hope soon became apparent for the power that controlled this waystation had control of the shipping routes between Europe and the East (Hunt & Campbell 2005). This resulted in the establishment of a strong Dutch presence in the Cape of Good Hope, which in turn meant that more land, local labour and local resources were needed to sustain this presence (Comaroff 1998), resulting in the development of a distinct colony by the end of the 17th century.

This era of colonisation had a distinct Dutch and British component because the Cape of Good Hope (also called the Cape Colony) was annexed by Britain and formally became a British colony in 1806 after another short period of British rule from

1795 to 1803 (Comaroff 1998). British colonisation had a distinct effect on South African history. Under Dutch rule, the Cape Colony witnessed the subjection of indigenous peoples to Dutch imperialism (Welsh 1998). However, British imperial rule marked more widespread subjection. Not only were indigenous people subjected to a different form of imperialism (British as opposed to Dutch), but Dutch settlers (known as Boers) who had become 'naturalised' inhabitants of the Cape Colony (in many cases 3rd or 4th-generation people born in the Cape) also became subjected to British imperial rule (Comaroff 1998). This marginalisation of the Boers led to widespread resentment against the British (Thomas & Bendixen 2000) and can be seen as the root of a liberation movement amongst Dutch speaking settlers, which would eventually crystallise in the Great Trek of the late 1830s (Ransford 1972) and later on in the rise of Afrikaner Nationalism in the 1930s (Prozesky & De Gruchy 1995).

The Great Trek of the 1830s resulted in the establishment of three Boer Republics, Natalia (1839), the Oranje Vrij Staat (OVS, Orange Free State) in 1854 and the Zuid Afrikaansche Republiek (ZAR, South African Republic) in 1852 (Eybers 1918). Although Natalia was annexed by the British in 1844 (Eybers 1918), the OVS and ZAR established themselves as autonomous republics and functioned independently until the signing of the Treaty of Vereeniging which marked the end of the South African War (also referred to as the Second Anglo-Boer War) in 1902 (Meredith 2007). The establishment of the Union of South Africa in 1910 laid down the geographical boundaries of South Africa as it stands today (Adu Boahen 1985).

The Union of South Africa marked the establishment of an independent dominion of the British Empire ruled as a constitutional monarchy, the British crown (monarch) being represented by a governor-general (Comaroff 1998; Thompson 1960). Initially ruled by a white, pro-British minority striving for white unity, a more radical National Party gained power in 1948. The National Party strove for independence from Britain and championed Afrikaner interests, very often at the expense of the interests of others (Thompson 1960). Under National Party rule, many of the 'apartheid laws' were passed in the 1950s and early 1960s (Meredith 1998). During this time, the disenfranchisement of indigenous people along with other non-white groupings in South Africa that came about through the import of slaves in the 17th and 18th centuries was heightened (Thomas & Bendixen 2000) and entered global consciousness under the term apartheid. The Nationalists gained independence from British rule (1961) in an era when colonial 'masters' had begun to relinquish political control, thus allowing former colonised territories to enter the fray as independent nation states (Peter 2007).

The third distinctive era of South African history is the apartheid era, which started, as mentioned above, with the rise to power of the National Party in 1948 and lasted until the first fully democratic elections took place on 27 April 1994 (Comaroff 1998). During this period, the disenfranchisement and marginalisation of non-white segments of the population reached its peak, and concurrently, protest action and guerrilla military action against the National Party government and the apartheid project also reached its apex (Ellis & Sechaba 1992; Meredith

1988). The international community also took action as the UN enforced economic sanctions against South Africa in 1985 (Knight 1990).

In 1994, South Africa witnessed the advent of the fourth era, that of the emergence of South Africa as a full democracy. However, as will always be the case in a heterogeneous society, the shift of power from minority rule to majority rule resulted in minority groups feeling marginalised because of efforts at 'redressing the imbalances of the past' (Anonymous 2008).

In summary, South Africa has witnessed a complex and at times violent and irrational history. In all of the eras outlined, certain groupings of this increasingly diverse society have been marginalised and disenfranchised to a lesser or greater extent. As far as the nature of business and management in the South African context is concerned, the net result of this history is that business ownership and management is seen as 'white' and labour is seen as 'black' (Thomas & Bendixen 2000). This statement is somewhat of a generalisation as initiatives such as Employment Equity and Broad Based Black Economic Empowerment have seen an increase in black ownership and management, albeit at a relatively slow pace (Booyesen & Nkomo 2006; Du Toit, Kruger & Ponte 2008).

The scenario presented above has led to a huge politicisation of labour unions in South Africa as well as widespread labour unrest which has had a marked influence on decisions concerning foreign direct investment as well as the general economy of the country. Occasionally this unrest takes a violent turn as seen during the events that unfolded at Marikana in August 2012. The core of this tension can be drawn back to the fact that the predominantly white

management corps (Booyesen 2007) employs Western principles of management that are in direct conflict with the values of the predominantly black labour force that are rooted in an African value system.

The immanent challenge of business management in South Africa thus seems to be not only to search for effectiveness and efficiency and, by so doing, to create value for the stakeholders of the organisation. Business management should have a far broader focus. This challenge implores us to revive and formalise the indigenous knowledge schemes unique to South Africa and its people with a view of addressing the inequitable power imbalances that exist in the South African business context. Williams, Roberts and McIntosh (2012) attest that much wisdom exists in terms of communal ethics pronounced by many indigenous societies. Dyer *et al.* (2014) add to this notion, stating that the wisdom prevalent within indigenous knowledge systems holds significant potential to help radically transform ostensibly immovable social and environmental issues facing not only management but humanity in general.

Indigenous knowledge can foster an interest in and appreciation of diverse ideas as a heuristic for developing scholars and business professionals who can promote the idea of justice and who can contribute to renewal of the environment (Dyer *et al.* 2014). One does see efforts to develop the type of heuristic eluded to above, as the transition to a full democracy in the early 1990s saw much energy around transformation in all spheres of South African society, with business management being no exception (Goldman 2013). In the mid-1990s, the so-called

South Africa Management Project (SAMP) was launched under the auspices of Ronnie Lessem, Barbara Nussbaum, David Christie, Nick Binedell and Lovemore Mbigi (Van der Heuvel 2008). SAMP promoted the African cultural value of *ubuntu* as a vehicle for greater cohesion and purpose within South African business organisations (Christie, Lessem & Mbigi 1994). Although, as an academic project, SAMP did not survive beyond the 1990s, it witnessed (and was in part responsible for) a heightened consciousness around *ubuntu* as a value system that could be utilised by management (Goldman 2013). However, it would also seem that much of the momentum built up around *ubuntu* by SAMP during this period has apparently faded during the past 10 years. SAMP can also not be seen as a critical endeavour. In as much as SAMP did challenge institutionalised beliefs around value systems in South African organisations, it seems that SAMP was a performative exercise as it used *ubuntu* as a tool or mechanism to further mainstream management thinking that is centred around increased organisational efficiency and effectivity. Indeed, some of the minds behind SAMP profited quite generously from the resultant business-consulting spin-offs. Nonetheless, SAMP did serve a purpose, which was to expose the potential of indigenous knowledge to contribute to business-management discourse.

For CMS to gain a foothold in South Africa, it is important to establish what is meant by 'indigenous'. Certainly, when one thinks of indigenous in the South African context, one immediately thinks of the ethnic black people of South Africa. However, are these the only people indigenous to South Africa? Immediately

apparent are the so-called 'coloured' (or 'brown') people of South Africa. The coloured people are of varied origin, including the lineage of Malay and Indonesian slaves brought to the Cape by the Dutch as well as indigenous Africans and settlers of European decent. Denoting a group of people as 'coloured' seems to be unique to South Africa as anywhere else in the world 'black' and 'coloured' would refer to the same group of people. In the South African context though, the term has come to denote a specific and uniquely South African group of people and their culture as opposed to a distinction on the basis of mere race. Should one therefore consider coloured people to be indigenous even though part of their lineage can be traced back to non-South African origins? In my opinion, coloured people do constitute a uniquely South African group of people and should thus be considered as indigenous. The same can be said of most groups of people that make up the South African population that can be traced to non-South African origins. Although part of the colonial process, white South Africans (and arguably, the Afrikaner more so than other white South African groupings), through generations of naturalisation, have developed an identity which is markedly different from that of their European ancestors. Does this not make them uniquely South African and therefore indigenous? The point is that, in order to address uniquely South African challenges, wisdom needs to be sought from everybody who inhabits and understands this realm. To exclude certain groups from this endeavour on the basis of historic lineage would marginalise the wisdom of a significant portion of the population. Therefore, the common denominator is 'South African'. In other words, the call is to actively search for South African knowledge that can address

South African issues in business and management and not merely perpetuate Americanised notions of Western capitalism in business management education, research and practice.

■ Conclusion and personal reflection

In an academic environment typified by the pervasiveness of positivist scholarship in business management and related disciplines, there seems to be a growing sentiment amongst academics that operate within this academic domain that the positivist endeavour does not have all the answers to the issues faced by business and its stakeholders in the South African context. Increasingly, business-management academics are exploring alternative epistemologies and methodologies to address these issues.

It must be stressed, however, that, although the position in Chapter 1 could be seen as an outright attack on positivism, this is not necessarily the case. The claim is not that positivism is deemed insufficient or of lesser standing. However, one needs to be open to the notion that different epistemologies are appropriate at different times and in different circumstances. As a science of verification, positivism has a definite role to play in building a body of evidence concerning the nature of the world around us. The problem is that, all too often, scholars want to prove the infallibility of a certain methodology above all else.

Positivism, as a science of verification, can complement CMS in a very definite manner. As positivistic scholarship attempts to build up a body of irrefutable evidence to explain reality, scholars embark on replication studies. If the same findings are made, more evidence

is added. However, what happens when contradictory findings arise from replication studies? Could that not in itself act as impetus for critical inquiry into these contradictions? The inverse could also be asked. If an alternate reality can be proposed through critical scholarship, why can a body of accompanying evidence not eventually be built to support these suppositions? All these scenarios are possible if one seeks areas of support between different epistemologies instead of seeking for areas of contradiction.

It seems that there is enough space to grow CMS as a research paradigm in the South African milieu. However, further investigation is needed to assess the direction that CMS must take in the South African context. Furthermore, before such a direction can be established, it would also be prudent to gauge the current level of understanding of the notion of CMS amongst South African business-management scholars and to bring together a critical mass of scholars interested in pursuing such an endeavour. Preliminary and informal discussions with fellow business-management scholars have indicated that such a critical mass would be possible, but this needs to be investigated in greater detail.

The (documented) history of South Africa has culminated in the disenfranchisement of many of its people. Although political democracy has triumphed and integration on a social level has gained momentum, economic and intellectual disenfranchisement is still an issue. With intellectual disenfranchisement, the problem is not that previously marginalised people are not gaining access to education and skills development. Rather, intellectual disenfranchisement

speaks to the postcolonial notion of the perpetuation of the colonial knowledge system (Mbembe 2016). Within the parameters of the scholarly endeavour of business management, this relates to Western capitalism and a perpetuation of mainstream business-management thinking. With the exception of the (now largely subdued) notion of *ubuntu*, precious little wisdom located indigenous knowledge systems has filtered through into the business-management discourse in South Africa. Through its very nature, CMS has the potential to redress this situation, making local knowledge more powerful in the endeavour to meet local challenges.

The student protests in South Africa that commenced in mid-October 2015 and that have become known as the #FeesMustFall campaign demonstrate the urgency of addressing this notion of intellectual disenfranchisement. Although the main focus of the #FeesMustFall campaign was the demand for free tertiary education, the students' list of demands included a so-called 'decolonisation of the curriculum', representing nothing less than an urgent call to address the pervasive intellectual disenfranchisement evident in South African education institutions. Decolonisation of the curriculum refers to the promotion and dissemination of knowledge produced by local, indigenous scholars. It urges a basic re-examination of the relevance of the knowledge produced and disseminated by universities (and other higher education institutions) by way of the curricula they pass on to students. The notion of decolonisation of the curriculum also rallies for a shift in the 'geography of thought' away from a European or American focus toward a focus of African thought, knowledge and wisdom (Higgs 2012; #FeesMustFall 2015). CMS has the potential to deal

with the challenge of the ‘decolonisation of the curriculum’ especially if CMS in the South African context is centred around issues of postcolonial discourse within the domain of business management.

If CMS is to prosper as an intellectual endeavour in South Africa, the champions thereof need to establish exactly what they should be critical about. This implies more than merely establishing the direction that CMS must take in the South African context. ‘Direction’ speaks more specifically to what should be studied in the South African context. To decide on ‘what we should be critical about’ implies the degree of radicalism that should be employed in South Africanised CMS and the degree of pragmatism that should be associated with South Africanised CMS.

■ Chapter 1: Summary

Critical management studies, as an emergent paradigm, has found its way into the discourse surrounding the academic discipline of business management since the early 1990s. However, in South Africa, critical management studies remains virtually unexplored. Through a critical, dialectical approach, this conceptual paper sets out to introduce the South African academic community to the notion of critical management studies. This will be done through highlighting how critical management studies came to be and through a differentiation of critical management studies from conventional thinking concerning business management. The discussion on critical management studies concludes by emphasising the central tenets of critical management studies, namely denaturalisation, reflexivity and anti-performativity.

After introducing critical management studies, the discussion turns to what it can offer in advancing business management as an academic discipline in South Africa. In this regard, the notion of postcolonialism is explored. Regardless of the political and theoretical ambiguities surrounding postcolonialism, the relevance of postcolonial thinking in the realm of business management is advocated as a possible avenue in the search for mechanisms to promote indigenous knowledge and Africa-centred wisdom as far as business management is concerned. In an academic discipline dominated by American and European wisdom and knowledge, the search for local and indigenous knowledge concerning business management is of paramount importance if we wish to successfully engage with the unique challenges posed by the South African business environment.

What is critical in critical management studies?

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Introduction

Planet earth is being exploited beyond its means! Human beings are in conflict with each other and with themselves. Man as such is 'nature sick unto death' (Žižek 2008:204). Societies are in debt, and human beings are continuing the exploitation of earth and other human beings through a new management fad called 'sustainability' as they become more narcissistic, materialistic and hedonistic in evolving from *Homo sapiens* into *Homo economicus*!³ This is a direct

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3. *Homo economicus* (economic man) is defined as: a theoretical human being who rationally calculates the cost and benefit of every action before making a decision (Collins Dictionary 2016). This definition is often expanded to include the agent making the cost – benefit analysis as 'narrowly self-interested'.

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result of modern man's so-called 'scientific method' of knowledge creation, characterised by a total focus on sense perception (the sensible) and a total disregard for the metaphysical. Theory creation in a social environment and the critique against these theories lack the critical element of the metaphysical and a total disregard for human nature. This is the critique against both theory and critical theory: It is lacking the non-sensible and metaphysical component that we find in human nature. The abovementioned statement by Žižek 'nature sick unto death' is not 'fashionable nonsense' (Sokal & Bricmont 1996), but these statements are supported by empirical evidence. Earth exploitation is reflected in the 'Earth Overshoot Day' report (Global Footprint Network 2016) where humanity uses 1.6 times the natural resources produced by planet earth in a year. If humans continue 'doing business as usual, we shall consume two times the resources produced by planet earth by the year 2030. This means that, every six months, we humans consume one year's resources produced by planet earth (or a planet every six months). In spite of this, we use a contradicting phrase such as 'sustainability' in both the natural and social sciences.

Societies are further overindebted. The so-called value created by organisations⁴ is funded by debt as reflected in the McKinsey's (2015:4) report, which indicates that global debt equals 286% of global production. The accompanying question is: 'How can you owe 300 times more than what you can produce?' From the two arguments above, it can be concluded that value is not being created but rather being destroyed. Taleb (2013) confirms this when he states

4. Organisations in this context refer to organisations in its broadest context, from profit seeking organisations, not-for-profit organisations and institutions of government.

that ‘in one day banks destroyed more wealth than what was created in a *hundred* years of banking.’

The two arguments above lead one to conclude that the collective (society) and the particular (humans) are entering a modern ‘apocalyptic era’ and that this so-called ‘brainy man – *Homo sapiens*’ is on the brink of extinction (Žižek 2011). This poses the question: ‘Why did this happen?’ The first clue in answering the question regarding the extinction of this ‘thinking’ species or ‘rational man’ is the Kantian view that ‘human rationality lacks the power to answer metaphysical questions, since our knowledge is limited by our specific and narrowly-circumscribed capacities for organising our field of sensation’ (Wicks 2015). Russel (1950:69) supports this with the view that ‘[*m*]an is a rational man – so at least I have been told. Throughout a long life, I have looked diligently for evidence in favour of this statement.’ Russel’s view is enforced by the unquestioned generation of knowledge in a social context (and in particular management) through the research paradigms of positivism, grounded theory, phenomenology and causality. Keat (1980) questions Russel’s views with the statement that ‘... positivism is unable to provide us with the basis for a rational criticism of existing social reality’. Marcuse (1964) summarised these observations with an aptly titled publication *One-dimensional man*. In the movie *The Matrix*, this ‘one-dimensionality’ is adequately captured by Morpheus when he informed Neo (*The Matrix* 2006):

The Matrix is a system Neo. That system is our enemy. But when you’re inside, you look around, what do you see? Businessmen, teachers, lawyers, carpenters – the very minds of the people we are trying to save. Many of them ..., so hopelessly dependent on the system, that they will fight to protect it. (n.p.)

This inability of rational man to answer metaphysical questions is then the first critical element that is lacking in the generation of theory and the critique of any such theory in the social sciences.

From 'one-dimensional man' and Morpheus's statement, we (one-dimensional man protecting the system) can concur with Žižek's (2011) prediction that we are 'living in the end times', and the horseman of this modern apocalypse is the worldwide ecological crisis, imbalances in economic systems, the biogenetic revolution and, lastly, the exploding social divisions and ruptures. Evidence and key indicators to these four horsemen are abundantly available in scientific journals and popular media. What is even more surprising is that, in the face of all the available evidence to the contrary (and the arguments presented by critical theory and critical-management scholars and scientists from other disciplines), the human species carries on with 'exploitative business as usual', or should we perhaps recall Morpheus's advice to Neo?

The scenarios highlighted above generated a response from individuals and societies (those that are not in control of the system) with statements and rallying cries such as 'occupy Wall Street', 'Rhodes must fall', 'decolonisation of curriculum' and 'all-inclusive capitalism'. These are cries of a global society at war with itself. It is inevitable that these phenomena would elicit a response in the academia and from social commentators. The response is a critique of the current social order, and this prevailing social order has a name 'capitalism'. It does not matter in which fashion the essence of capitalism (the legitimatised exploitation of natural and human resources; Žižek 2008:175) is dressed up and softened by inventing new words, concepts and phrases – capitalism remains exploitation

(the final cause) through control. The critique of the current (and not so current) social 'dis'-order found its contemporary audience through the introduction of 'critical thinking' and 'critical management studies' in social and management scholarship. In applied form, one finds it in what is known as the 'Pink tide or Bolivarian revolution' in the Latin Americas.⁵ What is important to note is that the first critique (in the Frankfurt School) was not only limited to the exploitation by capitalism but also to the exploitation under Marxism and other capitalist-opposing ideologies (Žižek 2008). What these concepts have in common is the common denominator of 'critique', the questioning of theory, thinking and actions in the prevailing social order (capitalism) or the in body of knowledge that supports this all-devouring social order.

This critique against the social order is not new and did not originate with critical theory. It has its origins in German idealism and romanticism that was the predominant philosophical quest in the 18th century (Taylor 1975:39). This critique arose in response to questions raised by the Enlightenment. In the 19th century, both philosophers and social commentators critiqued the social order and tried to establish an alternative such as that proposed by Karl Marx. In the 20th century, this critique continued in the Frankfurt School with their contribution to critical theory (critiquing the social order of the day such as capitalism and Marxism). This line of thought developed to where we find ourselves today with critical management studies (CMS) comprehensively presented through the work of Alvesson, Bridgman and Wilmot (2009) and Alvesson and Wilmot (2012). Apart from the

5. It may seem that I assume and take for granted that (business) management is part of the social order. This link is adequately argued by Alvesson and Wilmot's (2012:17) statement that [m]anagement is inescapably a social practice'.

18th-century German idealistic and romantic philosophers, other critiques mostly ignore the role of human nature.

Since Descartes and the dawn of the Enlightenment period, where the focus was on *res cogito* [rational human being] with a disregard for *res extenza* [the corporeal], led to a situation where man (*res cogito*) became divorced from the corporeal world (*res extenza*) or nature. German idealism and romanticism rejects this notion that the external world (corporeal world) can exist separate of my mind. These German idealistic philosophers, in particular Schiller, Schlegel, Hölderlin and Hegel (Taylor 1975:34–35) argued, to be human came naturally, but this unity died with the Enlightenment. The *cogitans* [mind] was divorced from the *extenza* [body],⁶ which brought conflict between mind and body. The unintended consequence was that ‘rational modern man had to be at war with himself’ (Taylor 1975:34–35). This ‘man at war with himself’ provides us with the second critical element not taken into consideration in a critique against the prevailing social order. That modern man is at war with him or herself implies modern man is in continuous contradiction with him or herself. Descartes’s conditions of existence (*res extenza*) clash with his inner *telos* [purpose]. To reconcile this contradiction was the objective of German idealism and romanticism (Taylor 1975:97).

The preceding brief introduction identified two critical elements of any social critique, namely the role of human nature (rational man and the inability to explain the metaphysical) and the fact that modern man is in contradiction with her of himself. The context of the social order against which this critique is aimed needs to be

6. This is known as the mind-body problem.

established and linked to the two critical elements of this critique. The discussion below is neither an attack on or a defence of the arguments on behalf of or against the current social order nor a critique or defence of an alternative social order such as socialism. Rather, it is a discussion to position the critique in order to determine what is ‘critical’ (or lacking) in this critique and to arrive at a reference point for continued discussion.

■ Philosophical positioning of the inquiry

In the quest to understand the environment and him or herself, human beings desire to know their environment and themselves. Aristotle (Metaphysics 980a-5) states that ‘all men by nature desire to know.’ How is this knowing generated, or how does this knowing takes place? The point of departure is the Platonic division between episteme (types of knowledge) and how we gain that knowledge, such as through our senses (seeing something) or by understanding. Aristotelian ‘causes’ support this movement from sense experience (material cause) to final cause or first principle. This highest level of understanding (knowing) is the most difficult as it is the furthest removed from the senses. The Cartesian separation of the *res cogito* and *res extenza* also separates man (the knowable, the observable) from the metaphysical (the non-observable).⁷ This is presented in Figure 1.

The diagram (based on Plato’s divided line, Aristotelian causes and Cartesian *res extenza*) provides us with a visual presentation of current knowledge generation where we as humans (researchers)

7. In philosophy, the metaphysical concept refers to ‘beyond the physical’.

What is critical in critical management studies?

<u>Causes</u>	<u>Divided line</u> <u>Division</u>			<u>Rational man</u>
	<u>Epistemology</u>	<u>Metaphysics</u>		
Final cause (First principle)	Being Knowledge	Understanding	Non-sensible	<div style="border: 1px solid black; border-radius: 50%; padding: 5px; display: inline-block;"> Area under investigation. Metaphysical </div>
Efficient cause		Reasoning		
Formal cause	Becoming Opinion	Perception	Sensible	Scientific method <ul style="list-style-type: none"> • Observe • Analyse • Comment • Causality
Material cause		Imagination		

FIGURE 1: Philosophical positioning.

observe phenomena through our senses. We see something, hear something or read something that stimulates the senses and creates an image (imagination). We then look for some evidence to see if the phenomenon repeats itself through material objects. Through mathematical means, we describe the observed phenomena and assume that we have created knowledge. To move to the epistemological level of ‘understanding’ (to become wise), however, we need to understand the ‘...ness’ of something. This ‘wise-ness’ was exhibited by King Solomon with the example of the two mothers and one child. King Solomon understood the ‘...ness’ of ‘mother-ness’, which is tender loving care, doing everything to protect their child. This ‘...ness’ lies at the metaphysical level of forms and the epistemological level of understanding.

This ‘...ness’ or Platonic metaphysical world is represented by the Aristotelian *causa finalis* [final cause]. The final cause is preceded, by the material cause, the formal cause and the effective cause. Aristotle relates this final cause to the ‘first principle’, that is, the ‘first thing’

that ‘causes’ a thing to be. He also argues that the final cause is the most difficult to understand as it is the furthest removed from the senses.

Modern man (that is, man affirmed in *res cogito* observing the *res extenza*) followed the Platonic road to knowledge creation. This knowledge can be categorised as the Aristotelian material and formal cause, but only a small part of it pertains to the effective cause and nothing to the final cause. Knowledge created by modern man ends with the Platonic knowledge level in which we use mathematics (statistics) to commit intellectual fraud (Taleb 2007:230–252) to protect the system.

This philosophical position can be summarised as one pertaining to the unknown knowns, identifying the void of the non-sensible and metaphysical created by modern man. It refers to those foundational or critical elements that we should know but do not know.

■ A social science: The unknown knowns

The discussion below is intended neither to critique nor to revisit the body of knowledge (deleting or adding) related to critical theory and critical management studies, and I am indebted to the inclusivity and comprehensiveness of the work by contemporary authors. However, a brief review of some important concepts generated by these authors is required to provide some context for the current research project. This will assist us to determine what is ‘critical’, that missing link to the non-sensible and metaphysical, that which is missing in the prevailing social order. The discussion does not claim

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to be comprehensive but will be limited to a discussion of the prevailing literature.

The first reference that can be contributed to the enlightenment and the separation of the thinking man from the bodily man (*res cogito and res extenza*) goes back to Adam Smith (1758:13). Smith uses the example of 'making a pin', indicating how this process can be divided into 18 separate and distinct operations. The commentator in the movie *Seabiscuit* uses the example of how the work of a dressmaker is broken up into its separate activities. The result of this division is that the human being became divorced from the fruits of his or her labour. A blacksmith becomes a welder, a dressmaker becomes a button sewer, and a carpenter becomes a knob turner. Due to this separation (of value creation into separate activities that can be controlled), humans do not see the value that they create as the human being and his or her labour becomes a commodity (Marx 1867:1–7). As a consequence, their reason for existence disappears. Through customisation, humans have been alienated from their purpose or inner *télos*. This alienation is a direct result of advances in technology.

Any economic activity is built on the exploitation and destruction of resources. Marx (1867) expressed it in the following way:

Moreover, all progress in capitalistic agriculture is a progress in the art, not only of robbing the labourer, but of robbing the soil. The more a country starts its development on the foundation of modern industry, the more rapid is the process of destruction. (p. 254)

This claim by Marx immediately questions the role of technology and the fashionable concept of 'sustainability'. As 'robbery' occurs, there cannot be something like 'sustainability' (apart from sustaining robbery)

as it is based on a process of destruction through the use of technological advancement. This then leads us to the next social problem, which is that advances in technology assist a ‘society ... [to] sustain its hierarchic structure while exploiting ever more efficiently the natural and mental resources’ (Marcuse 1964:loc. 2795). This view is further supported by Žižek (2011) who argues that technological advances will have the following effect:

[T]he global economy is tending towards a state in which only 20 percent of the workforce will do all the necessary work, so that 80 percent of the population will become basically irrelevant, ... unemployed. (p. 211)

Apart from the exploitation upon which Marcuse and Žižek commented, technological advance also led modern man to (falsely) believe that technology will ultimately save the human species (and planet earth).

The nature of this social order (capitalism) is continuously under threat. John McDonnell (2015) – the British shadow chancellor – argues that ‘Karl Marx has come back into fashion.’ Yanis Varoufakis (2015)– the Greek Finance minister during the 2015 Greek crisis – describes the response of Greece’s creditors (Troika – the IMF, the World Bank and the European Central Bank) as follows: ‘What they are doing with Greece has a name: terrorism.’ Perhaps the voice with the most following is that of Pope Francis (2013) who describes capitalism as the ‘new tyranny’, a description which he supports by a statement: ‘Not to share wealth with the poor is to steal.’

Despite these views and statements, the alternatives to capitalism did not perform any better. Instead of contra-capitalism, it went under the name of ‘alternative modernity’. The first response in this ‘alternative modernity’ was the French revolution.

Singer (1983:loc. 710), in his publication *Hegel: A very short introduction*, informs us that the French revolution was the result of criticism against the existing social order. This is a consequence of the Enlightenment where humans has the right to assert itself, to become 'free'. However, the result of this revolution (new freedom) was revolutionary terror (much the same as we see with the so-called Arab spring and the destruction of property in South Africa) with and without legal formalities that inflicted punishment through a quick death at the guillotine.

Marxism and its various variants in the form of Leninism, Stalinism and Maoism did not perform any better and is now history.⁸ This modern modernity is also known as 'the great proletarian cultural revolution', the aim of which was not only to take over state power but an economic reorganisation to create a new form of everyday life, a 'new crime' that destroyed another crime (Žižek 2008:205). Žižek (2008:176–179) also argues that this proletarian revolution merely displaced the social order to turn an advanced country into a backward country. For Chairman Mao, the proletarian revolution should have taken place amongst the impoverished masses of the Third World, for example in the Latin Americas.

A workable social order might have been Bolivarianism (Pink tide) in the Latin American states. The only viable economic idea from this so-called left is the 'basic citizen's income', a form of rent

8. Even socialism in the EU is now under threat from austerity measures enforced by the troika (Varoufakis 2015).

ensuring the dignified survival of all citizens. The term ‘rent’ characterises capitalism in which ‘rent’ should be paid to the owners of capital, rent collected and paid by those who dispose of natural resources and, finally, ‘rent’ to the workforce. There is, however, also ‘another’ rent, a rent paid to all citizens of the state. This basic citizen income (independently of what you do) was signed into law in Brazil in 2004. How will this be funded? This citizen’s income will be funded through ‘the very profit seeking process which sustain capitalist productivity [*that is*] is to be taxed [*additionally*] to provide for the poor.’ The same model was followed by other Latin American countries such as Chile and Venezuela.⁹ However, Žižek (2011:233–243) is of the opinion that other countries (and citizens) are being exploited by this alternative social order and that ‘something has to give’.

The discussion above, arguing that the current situation is untenable and that the alternatives did not perform any better, might lead the reader to despair. Life and particularly the social order and economic life may appear to be futile. These unknown knowns (those characteristics and/or knowledge that we take for granted without understanding where they come from and that we just ‘assume’) firmly fit into the Platonic epistemology of imagination, perception and opinion without understanding the driving force behind all of these so-called forms of scientific knowledge influenced by human nature.

9. In Africa (Zimbabwe) it went under the name of ‘indigenisation’ (Roberson 2016).

■ An observation of futility

In the South African context, the contradiction between the ‘good’ for capitalists¹⁰ and the ‘good’ for a particular community is portrayed in the case of Xolobeni vs. Transworld (a fully owned subsidiary of the Australian Mineral Commodities Company [MRC]). The owners of capital, MRC, want to mine pristine tribal land in the Transkei area of South Africa whilst the Xolobeni community is opposed to this as it will destroy their ancestral land and life style. They have effectively (legally) stopped the mining process, but there is a resurgence from MRC to develop the mine, and this has created conflict in which some of the activists (those opposing the mining operations) were killed (Tabelo 2016).

The forecast for the community (and society) is grim. In the movie *Star Trek*, the Borg states: ‘Resistance is futile. You are being assimilated. We will succeed’ (*Star Trek: The First Encounter*). The statement by the Borg (*Star Trek*) is analogous to Morpheus’s (*The Matrix*) statement to Neo: ‘Look around you Neo. Carpenters, lawyers ... They will do everything in their power to protect the system.’ The Borg (capitalists) will succeed, but why will they succeed?

Gibran (1974:41–57) informs us through his essay entitled ‘Satan’ about the dilemma in which theoreticians, critical commentators, managers and ordinary humans find themselves on a daily basis. The essay introduces us to a priest walking through an abandoned village street on a cold rainy night and hearing a groan of suffering coming from the dark. Upon investigation, he encounters an individual severely injured by an attack and close to death. Upon

10. The term ‘capitalists’ is used in its Marxian form, meaning the owners of capital, those with the money (Marx 1867:135).

further investigation, the priest determines that it is Satan lying there. Satan begs the priest for help. Upon seeing the priest's hesitation, Satan engages in a discussion with the priest and informs the priest that their destiny is entwined – they cannot do without one another. If Satan dies, what will the priest do as there will be no work to do? There will be no sinners, no evil and no hunger. It is not only the priest that will be without work but also people in other occupations such as doctors, nurses and lawyers. Furthermore, what about the priest's duty to save sinners? In the end, the priest picks Satan up, dresses his wounds and saves him.

This is the same dilemma in which we as theoreticians and managers in business and society find ourselves. We critique management but are managers. We critique capitalism whilst we partake in the processes and proceeds of capitalism. We ask for a different social system than capitalism, but we require the fruits (profits) of capitalism to power a different social system. We ask for critical thinking but are one-dimensional ourselves. This is the second critique against critical theory and critical management studies (or for that matter social studies): We are part of this contradicting system, no matter how violent it is.

Zizek's (2008:151) interpretation and commentary that 'not even Hitler was violent enough' and that 'the killing of 30 million Chinese during the cultural revolution' was not enough to stop capitalism, reflects on the futility of fighting the system (capitalism) and can serve as a wake-up call that something else (instead of a revolution – a violent reaction) is required to reach a breaking point where 'good' can be interpreted as 'good' for society and not only for individuals. The aim is for humans (and creation) to co-exist without any form

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of exploitation, sub-ordination and control. This requires that humans need a return to their reason for existence, their purpose in life and their relationship with nature. It requires a reconnection to the sensible and the metaphysical, a reconnection with what we observe through our senses and mind with the metaphysical – that which our senses cannot observe and our mind cannot comprehend. It requires a change in human nature.

We can now establish a point of reference, not only in terms of this discussion but also for future discussions. Do we stay comfortable in our contradicting social environment, ignoring our *télos* or higher purpose (the metaphysical), do we stay biased and ‘one-dimensional’, or do we change?

■ Human nature

This section introduces the nature of modern man in an attempt to align what is critical in the contemporary social order with the way forward. The two concepts that will be presented is the birth of modern man through ‘enlightenment’ and its related concept ‘freedom’.

■ The birth of modern man

Any social science is confronted by contradictions. The analogy of a coin serves as the best example here. A coin consists of three sides. Initially one would think that a coin has a heads side and a tails side, but the link between these two opposites is the side of the coin (the third side) that represents reality (though not yet truth). This also establishes the unspoken reality of research and knowledge creation.

Knowledge is a representation of reality at a specific moment in time and space presented to us through our senses. It is not the truth as Cooper (2012:44–46) informs us that the truth ‘is unchanging, always the same.’ The moment one introduces the human agent who is predictably irrational (Ariely 2008), one cannot use the term ‘truth’. Rather, one should use the term reality as it is bound through the senses in time and context. The defining moment for rational man in time and context was when Descartes stated: ‘*esse est percipi*’ [I think therefore I am]. This is the birth of modern man where the existence of the self is demonstrated and everything outside of the self is in doubt, even God (Taylor 1975:6). According to Kant (Taylor 1975:66), the birth of enlightenment also leads to the notion of rational freedom, and it is not only rational freedom that all humans desire but ‘freedom’ *tout court*. This ‘freedom’ is then also an essential requirement for separating man from the metaphysical – those unknown knows that can bound man in its rationality.

■ The contradiction of freedom

One of the outcomes of enlightenment, and one that is used as a morally laden concept today, is the concept of freedom. In the context of social science and more specifically management, one has to ask: What does freedom mean? Marx (1867:135–136) informs us that, in a free market (as presented by capitalism), the owner of money and the owner of labour meet in the market and deal with each other on the basis of equal rights. Both are therefore equal and free in the eyes of the law. If the owner of labour sells himself to the owner of capital, he or she ‘... converts himself from a free man into a slave, from an owner of a commodity [*labour*]

into a commodity' (Marx 1867:135). Žižek (2008:205) explains this relationship as follows: As an individual, you have the freedom of choice (rational choice) to decide about your actions. The moment you exercise your choice (actually doing it), you become a slave not only of yourself but also of the master. You exercise your freedom to be employed by an organisation (Marx's owner of money), but the moment you sell your commodity (labour) you become the slave of the master (the owner of money). The same argument applies to any other inherent human commodity that you exchange for something else: the master-slave relationship is being established. Hegel (Singer 1983:loc. 756) informs us that 'this term "freedom" is an indefinite, and incalculably ambiguous term ... liable to an infinity of misunderstandings, confusions and errors.' According to Hegel, freedom is when we can freely choose between alternatives based on reason and not be coerced by external circumstances. However, the contradiction in freedom in the modern organisation is that '[you can] reason about whatever you want and as much as you want – but obey!' (Žižek 2008:87).

In confronting this contradictory nature of social science and management, we require a radical new way of seeing reality, a new way of seeing life. But how do we change? Hadot (1995:28) provides us with a solution in that '[p]hilosophy is an art of living that cures us of our illnesses by teaching us a radical new way of life.' Before Hadot, Plutarch informs us of the following (Eikeland 2008):

[T]he multitudes who come to Athens to school were, at the outset, wise, later they became lovers of wisdom, later still orators, and as time went on, just ordinary persons, and the more they laid hold on reason the more they laid aside their self-opinion and conceit. (p. 51)

■ Ancient Greek philosophy as a response: Human purpose and human action

Van der Linde (2015) expresses the opinion that a Copernican revolution¹¹ is required in management thought, that is, a new way of thinking about management. Although I accept the argument that theoreticians and practitioners of management require a new way of thinking about management, I am of the opinion that it will be a futile exercise as human thinking is mediated by its experience and already tainted by being in the ‘system’. Therefore, only critiquing the system, as is done in critical theory and CMS, will not suffice. A change in the social order and management practices requires action.

In contemporary scholarship, this ‘action’ is supported by Alvesson and Wilmot (2012:25), arguing that critique does not end with critical reflection on the phenomena under observation. Rather, it also requires practice that must be actively engaged with and struggled for. I agree with this argument that action (doing) is required as it was adequately expressed by Socrates: ‘[W]hen Hippias demanded the definition of justice from Socrates, he finally responded with these words: instead of speaking of it, I make it understood by my acts’ (Hadot 1995:23). In ancient Greece, the motivating force behind the best human life was informed and practiced by *lôgos* [reasoned speech] and *práxis* [doing] aimed at *phrónêsis* [the right thing], hence Socrates’s statement.

11. Kant refers to his ‘Copernican revolution’. As Copernicus changed our thinking about the universe, Kant changed our view of how we think about knowledge (Wall 2005:239).

■ Why ancient Greek philosophy to guide modern human action?

All critical commentators would agree that a new way of thinking about the prevailing social order and management is required. The question must then be asked: Why ancient Greek philosophy? Hadot (1995:19–29) provides us with arguments in favour of returning, through Greek philosophy, to the ancient Greek way of life.

One of the consequences of the enlightenment and the resultant modern man is the separation between mind and body (or, the mind-body problem), a separation between the sensible and the non-sensible or metaphysical. Eighteenth-century German philosophers attempted to reconcile mind and body, but modern man in the form of *Homo economicus* still treats them as separate. In ancient Greek philosophy, there is no separation between mind and body. It is a living *práxis* based on and supported by *lôgos* [reasoned speech] in achieving *phrónêsis*.

The focus in education (particularly in developing countries) today is on transferring facts – assumed to be knowledge. Technology such as Google provides us with ‘Just-in-Time Knowledge’ (JIK) or ‘knowledge on demand’. Einstein informs us that ‘[e]ducation is not the transferring of facts but the stimulation of the mind to think.’ This is what ancient Greek philosophy has as its purpose. The philosophical discourse was aimed at ‘forming’ rather than ‘informing’, at ‘becoming’ rather than at ‘being’. The subjects (humans) are being formed by transforming their souls – a reconnection with the metaphysical. The experience gained in

solving a problem was not the solution itself but the wisdom¹² and experience gained on this road towards the solution; was in the way that you do it, the *práxis*.

A new way of thinking provides us with the theoretical concepts of how society (and therefore management) should operate. However, theory is never an end in itself and must be put in the service of practice. Aristotle enlightens us with the following statement in *Metaphysics* (981a14): '[A]nd we even see men succeeding more than those who have theory without experience.' But where does this *práxis* start?

The starting point in this (*práxis*) transformation process is '*Gnothi seauton*' [know thyself]. In knowing yourself, you know your place in the natural and cosmic order (and your relationship to God), you know your limitations, you know your relationship with other human beings, you know your relationship to nature, and lastly, you know your purpose (final cause or first principle). This is presented in the Platonic movement from 'becoming to being' (from sense knowledge to wisdom). It requires a reasoned action in every aspect of the subject's life and in the life of the city – which was accepted universally in Athens for living the 'good life'.

A good life

Instead of a 'Copernican revolution' or new way of thinking about management, I propose that we as management theoreticians, managers and human beings review and rediscover the wisdom and

.....
12. The term 'wisdom' is used in the Platonic context where knowledge is formed by mathematical objects whilst wisdom is formed by Forms, an understanding of the metaphysical or in ordinary grammar, the '...ness' of something.

concepts from the ancients and those who came before us. I propose that we practice what we preach and turn our thinking into *praxis*. In this context, I recommend that we as theoreticians and managers follow German idealism and its romantic approach of turning to the Greek city states (polis – of which Athens is the best known) where individuals in society (the particular in the collective) strove for the ‘good life’. In this context, the term ‘good life’ according to Aristotle (Nicomachean ethics and politics) means a virtuous life that takes into consideration the end (or first principle). My approach will thus start with the Athenian collective or polis where the first principle (or the end) to be achieved is established by the Athenian Oath.

After the 2008 financial disaster, the alumni of Harvard University, the class of 2009 (MBA OATH 2009), rediscovered the Athenian Oath and started a movement in which they encouraged people with an MBA (read ‘management and managers’) to make a pledge according to the ancient Athenian Oath. This oath was pledged by all males coming of age in the polis (city state) of Athens, and it guided their actions and activities within the city state. This Athenian Oath reads as follows (translated) (National League of Cities 2013):¹³

We will never bring disgrace to this our City by an act of dishonesty or cowardice. We will fight for the ideals and sacred things of the City both alone and with many. We will revere and obey the City’s laws, and will do our best to incite a like reverence and respect in those above us who are prone to annul them or set them at naught. We will strive unceasingly to quicken the public’s sense of civic duty. Thus in all these ways, we will transmit this City not only, not less, but greater and more beautiful than it was transmitted to us. (n.p.)

13. The expanded version of the Athenian Oath as adapted by the Alumni of Harvard, class of 2009, is available at www.mbaoath.org

Two concepts underpinning the oath, namely *télos* and *phrónesis*, are fundamental to living the ‘good life’ in society (*polis*).

■ ***Télos*: Purpose**

The first constituent part of the good life is the end or *telos*.¹⁴ This part deals with our purpose, our aim, what we want to achieve. In contemporary management vocabulary, the concept of *télos* is also known as an objective, goal, target or vision. The example used by Aristotle is that of a target with a bullseye. The bullseye represents our aim: What we want to achieve is to hit the bullseye. Hitting this bullseye every time is the perfection of our *práxis*. As indicated above, this is a very simplistic view of *télos*. However, no discussion on teleology can proceed without an understanding of the Aristotelian concept of *causa* [causes] of which the final cause or *causa finalis* is the last cause (the Aristotelian causes, in order, are the material cause, formal cause, efficient cause and final cause).¹⁵ This final cause is not only applicable to nature and natural things but also to humans and society. It attempts to answer the question: ‘Why are we (humans) here, what is our purpose in this city (society)?’ Aristotle links final cause to the concept of ‘first principle’ or *télos*, but he also makes it very clear that this is the most difficult level of understanding to achieve and to perform when he states the following: ‘... the most universal, are on the whole the hardest for men to know; for they are the furthest from the sense’ (Metaphysics 981a26).

14. Although the original ancient Greek words are used with an English translation, the translation in itself may be inadequate to provide the correct meaning of use in the original text (Hadot 1995:vi).

15. For a thorough reading of the Aristotelian causes, the reader is referred Aristotle’s *Physics, Metaphysics and Categories*.

The essence of human *télos* or our purpose in this city is reflected in the last sentence of the Athenian Oath where it is stated that the goal is to ‘... transmit this City not only, not less, but greater and more beautiful than it was transmitted to us.’ Our *télos* as human beings is a fundamental requirement for our existence. This *teleological* approach is reconfirmed and supported by Pope Benedict when he speaks of reason. According to Žižek (2011:92), he ‘... speaks of a pre-modern teleological reason, the view that the universe is a harmonious whole in which everything serves a higher purpose.’

The other elements of the oath inform us about what we need to do and how to do it (the doing). This is reflected in the concept of *phrónêsis*.

■ ***Phrónêsis* or the golden mean**

The second constituent part of living the ‘good life’ is the action or activity (the doing) that needs to take place to achieve the end or first principle. This second part in striving to achieve the end (the oath pledged) – often taken for granted – is the concepts of *phrónêsis* and *phrónêmos*. In modern terminology, *phrónêsis* is known as the golden mean, and *phrónêmos* is a human being acting virtuously (that is, acting through reasoned deliberation).

What is this *phrónêsis* or golden mean then? The easiest way to describe it is as the mean between two contraries or two excesses. The example mostly used (by and since Aristotle) is that of a soldier. The contradiction is that a soldier can either be a coward (a deficiency), at the one extreme, or reckless (also a deficiency), at the other extreme. However, if the soldier does the correct thing (defend,

attack, fight), he is courageous. This courageous soldier is then acting (doing the right thing) through reasoned deliberation (without taking into consideration bodily pleasure and harm – which are driven by the senses). This ‘doing’ attitude from ancient Greek history is also reflected in the battle of Thermopylae. (In this instance, the soldiers were Spartans and not Athenians, but the underlying principles were practiced in all of the Greek city states).

An important characteristic of *phrónêsis* is the existence of a continuum between two extremes (Categories 10b26–13b12). The more experience you gain (through deliberation and doing) in pursuing the *télos*, the more it will become a *héxis* ([habit] – a thing that you do unconsciously without even thinking about it) of doing the right thing. Aristotle (Eikeland 2008:63) indicates three qualities that the agent must possess in order to act virtuously. Firstly, they need to act with knowledge. This knowledge is aligned with the *télos*. Secondly, the doing (actions) must be chosen for its own sake and not be determined by ulterior motives. Lastly, these actions must spring from an unchanging, virtuous character.

One of the activities required in the Athenian Oath (*We will revere and obey the City’s laws*) can serve as an example of *phrónêsis*. You cannot obey and act according to one law of the polis. You need to obey and act according to all the laws of the polis. This acting (instead of thinking) was adequately demonstrated by Socrates in Plato’s *The death of Socrates* (Plato 1997) where, until his death, Socrates revered and obeyed the city’s laws (which was a direct cause of his being sentenced to death).

As a human being, through knowing your inner purpose (*télos*), through applying rational reasoning (*lôgos*), you will be doing the

right thing (*phrónêsis*), and by gaining experience (doing it consistently), you will live the 'good life'. This good life that you practice according to your *télos* needs to become a *práxis* through a reasoned, deliberated *lôgos*.

The quest to re-think management is not a new phenomenon or a social fad but a continuous process that started with the advent of management. The critique against management (and social sciences) at this point in the evolutionary process is the 'one-dimensionality of man'. This one-dimensionality is informed, maintained and supported by the 'system'. Nigel Farage (the UKIP leader in the UK) expresses the frustration of ordinary citizens in society with the prevailing system through the following statement after the Brexit referendum by saying the following (Farage 2016):

We have fought against the multinationals, we have fought against banks, we have fought against lies, corruption and deceit, and today honesty, decency and belief in nation, I think now, is going to win. I hope this victory brings down this failed project ... (n.p.)

This failed project is a reference to the European Union, which, from a critical perspective, is just another form of central control.

The reader is further referred to the deliberation in the section where it was argued that, under the auspices of *liberté* [French revolution], a new form of exploitation was established, namely democracy. Žižek (2009:183) reports that '[t]oday the enemy is not called the Empire or Capital. It is called Democracy.' The terror created by democracy was clearly illustrated during the referendum in the UK on 23 June 2016 where democracy exhibited its reign of terror with the 'Brexit' vote. Financial markets were in turmoil, and the so-called 'technocrats' in the European Union are already calling

for another form of capitalism with Adler (2016:n.p.) reporting that ‘[t]hat’s why you’ve been hearing the words “EU” and “reform” of late from the nervous mouths of some you’d least expect, such as Germany’s Angela Merkel, and Donald Tusk.’

The current critique against the social order and exploitation (natural and mental) will carry on unabated. Crises created by modern man will become more frequent and more severe as it wants to disrupt the current social order, the one-dimensionality of human thinking.

A critical re-think is only that: think. Action is required, but it cannot be in the form of a revolution (which only results in terror). The required action is *práxis* linked to a higher purpose (*télos*), a re-connection with the metaphysical that will create a whole that recognises the natural and cosmic order in which humans exist.

■ Chapter 2: Summary

Critical theory and critical management studies entail a critique against the prevailing social order and management. This critique is based on the ‘sensible’ world – that world that we perceive through our senses – and the assumption of a rational human being. This critique is questionable as it ignores human nature, which belongs to the non-sensible and metaphysical world. The impact of management thinking on society and nature is based on the sensible world that results in the exploitation of humans and nature. The only way to change this impact is not by ‘creative’ or ‘new’ thinking but by understanding human nature that drives this behaviour. To investigate the causes of this exploitation, we need to look at

What is critical in critical management studies?

human nature. The discussion starts with the Cartesian enlightenment that separates mind from body (*res cogitans and res extenza*). This separation created modern rational humanity that is in continuous contradiction with itself and divorced from the natural and cosmic order, a divorce which resulted in humanity becoming one-dimensional. This divorce was further entrenched by Adam Smith who broke up the value creation process into activities. A blacksmith became a welder, and according to Marx, the labour of the labourer became a commodity. This divorce between mind and body, between the labourer and the fruits of labour, between human and nature is a critical issue that is ignored by the critique of any social order. To align mind and body, to reconcile humans and nature, we need to turn back to ancient Greek philosophy and the concepts of *télos*, *práxis* and *phrónêsis*. The doing then becomes more important than the thinking.

Critical theory and contemporary paradigm differentiation

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■ Introduction

Critical theory, drawing from the enlightenment tradition, considers social science to be tasked with liberation from ‘unnecessary restrictive traditions, ideologies, assumptions, power relations, identity formations, and so forth, that inhibit or distort opportunities for autonomy, clarification of genuine needs and wants’ and therefore greater and lasting satisfaction (Alvesson & Willmott 1992:435). Steffy and Grimes (1986:334) stress that, besides ‘expanding the research agenda by subjugating methodology to epistemic critique,

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critical theory would also affect the structure and activities of the scientific community' and more fundamentally 'potentially affect the structure of the scientific community itself' due to the intimate relationship 'between methodology, as well as the criteria for what constitutes a valid scientific product, and the social structure of the scientific community' within which research outputs are produced. Critical management studies (CMS) is taken to encompass the application of critical theory to the field of management, building on an agenda that is subjecting methodology and its ontological and epistemological assumptions to critique as well as interrogating ideologies or management practices which inhibit or distort opportunities for autonomy and emancipation. Such a project is considered particularly important in the South African context as management theory and practice within the context of this developing country stands at the nexus of theory developed in resource-rich contexts and the need for new theory which incorporates an emancipatory agenda applicable to one of the most unequal societies in the world. In such contexts of radical inequality, it is possible that people in working contexts are more vulnerable to managerial practice which fails to incorporate a normative agenda as a bedrock of values to ensure that human emancipatory principles act as a counterbalance to exploitation. What makes the South African context unique is arguably its dramatic inequality, a microcosm perhaps of the digital divide between Global North and Global South, where technology and knowledge creation may, through global management practice, be deepening inequality.

Given certain seminal perspectives from critical theory and the need to develop novel theory which can be relevant to

developing contexts, Chapter 3 seeks to build on the critical-theory vision, offering an argument that a discussion concerning the influence of technology on theory generation and knowledge engagement needs to find a place within Burrell and Morgan's (1979) paradigmatic differentiations. This is deemed to be particularly important in order to take into account what is described here as paradigmatic change in the structure of the scientific community itself as well as in its constituent methodologies. Special consideration is given to the rise of Internet and social-media technology and their wholesale disruptive effects. These have, arguably, up-ended power relationships (Callaghan 2016a) in certain organisational and societal contexts, potentially contributing to an emergent and disruptive paradigm of democratisation of science. This paradigm is related to the rise of movements prioritising transparency and population engagement (Bonney *et al.* 2009) as well as scrutiny of scientific research (Funtowicz & Ravetz 1994) on the part of technologically empowered stakeholders.

■ New developments on epistemological and ontological frontiers

Arguably, radical new epistemologies and ontological perspectives have emerged on the back of new technology such as crowdsourcing, crowdsourced research and development (R&D) as well as social media, offering new opportunities for innovation platforms (Allio 2004; Aye *et al.* 2016) and boundary spanning (Carlile 2004) to transcend the knowledge-aggregation problem (Hayek 1945; Von Hippel 1994) and enable problem-solving capabilities in real-time research (Callaghan 2014, 2015, 2016b). Arguably, the emerging

paradigm in scientific (both social and natural) sciences ‘closes the circle’ as citizen science and participant-led research paradigms together with post-normal science movements herald perhaps not only a radical new ontological paradigm in science but also a radically new epistemological paradigm premised on radically increased innovative potential related to harnessing the ‘crowd’ or democratically inclusive populations in problem-solving itself. Long-standing views in critical theory are however considered central to this emergent change, lest it lose its focus and its *raison d’être* [purpose] as an emancipatory project premised at freeing innovative science from its yoke to markets and the underprovision of innovation to poor populations and lest it finds another path back to dystopian value-less science.

■ The importance of developing CMS research

Chapter 3 therefore seeks to develop a conceptual framework that incorporates theory related to these new developments into a synthesised model which updates Burrell and Morgan’s (1979) framework and which offers useful heuristic properties for developing management theory. This research is considered important for the following reasons.

Firstly, theorists using Burrell and Morgan’s (1979) framework to derive principles and to locate their work in relation to other theory arguably do so in the absence of literature related to what are seemingly powerful new social forces enabled by Internet and social-media technology as well as an underlying social connectivity enabling a host of emergent methodologies unplaced in the Burrell

and Morgan schema. Arguably, Burrell and Morgan's (1979) paradigmatic differentiation also predates important developments in organisational theory. These include developments in corporate culturism (Willmott 1993a), control through identity regulation (Alvesson & Willmott 2002), critical-theory critique in the literature and other work on the power of values which link the role of values to emergent technology that can amplify their effect (Feenberg 1991, 2005, 2009). Therefore, Burrell and Morgan's views are predating the role of increasing connectivity and democratisation in supplanting totalitarian ideologies with critical humanist realities. The costs for managers and management researchers seeking heuristic benefit from Burrell and Morgan's (1979) schema without integrating contemporary theoretical developments may manifest in impoverished theorising which does not adequately provoke contemporary ontological and epistemological considerations. In particular, I refer to those related to what is arguably a new paradigm in science, both social and natural, and which in turn has perhaps upended many historical assumptions about the social world in which managers are nested. Populations in the Global South may face a growing digital divide in comparison to the Global North, from and across which multinational firms bridge and draw resources and profits. However, without an infusion of CMS values, populations in developing countries may be vulnerable to power dynamics associated with the growing power of digitally enabled managerial elites.

Secondly, the new paradigm of societal connectivity perhaps heralds a new era of accountability for managers. This accountability

has two characteristics. The first is that the monopoly power of capital may increasingly be disrupted by increasingly powerful relationships between expert tacit knowledge and firms' performance in the individual and knowledge economy (Callaghan 2016a). This means that managers will no longer as easily be able to take recourse to power vested in capital and they might need to understand more nuanced and complex management practices in global contexts of rapidly increasing interconnectivity. The second characteristic is that increasing societal interconnectivity has perhaps amplified the strength of accountability mechanisms faced by managers. Given these changes in power structures, which are not independent of the rise of the 'crowd' or increased voice of stakeholders, it is considered important to offer a management-relevant model of paradigm differentiation which makes explicit the emergent ontological and epistemological issues in contemporary science as management contexts are embedded in societies that are experiencing these changes. The need for South African populations and the 'crowd' enabled by social media to be able to hold accountable the monopoly power in management and other contexts is particularly important given increased vulnerabilities associated with populations that are disenfranchised and disempowered through historical events, the legacies of which persist in their influence.

Thirdly, given the rise of what are termed the 'democratisation of science' movements in the form of citizen science (Bonney *et al.* 2009), participant-led research (Vayena & Tasioulas 2013) and post-normal science (Funtowicz & Ravetz 1994), epistemological imperatives may exist to reshape research processes to take advantage of very large real-time data collection, synthesis and analysis

capabilities provided by crowdsourcing, crowdsourced research and development and social media as connectivity mechanisms. Probabilistic innovation theory (Callaghan 2015) can be understood to predict the eventual emergence of yet another paradigm of extreme radical change, termed 'transcendence' for the purposes of Chapter 3. Extrapolation of trends towards the democratisation of natural and social science also seem to converge with emancipatory visions of critical theory such as those espoused by Alvesson and Willmott (1992:435) as scientific endeavour, in contrast to the predictions of many, may ultimately come to achieve emancipatory outcomes (Feenberg 2009) if stewarded by critical theorists. Importantly, the transcendence paradigm developed here is taken to be a natural outcome of technological emergence and exponentially increasing potentialities driven by increased interconnectivity. The third contribution of Chapter 3 is therefore its attempt to make explicit not only contemporary paradigm differentiation but also to provide a theoretical rationale for a future paradigm premised on current trajectories of ontological and epistemological change in science. These changes towards a more inclusive global paradigm are expected to contribute to a more equitable distribution of knowledge resources over time but only if CMS values can be embedded in scientific endeavour, including the field of management.

Chapter 3 proceeds as follows. Firstly, a theory of paradigms is introduced, and the radical verificationist and radical emergence paradigms are considered as extensions of the Burrell and Morgan (1979) schema, based on ontological and epistemological characteristics grounded in relatively more recent societal and scientific changes and the emergent properties of these changes.

Theories of emergent change are discussed, including predictions of probabilistic innovation theory, and discussions are grounded in critical-theory notions concerning technology (Feenberg 1991). These theories can, with critical-theory leadership and technological change result in the convergence of emancipatory values. A model of contemporary and future paradigm differentiation premised on ontological and epistemological assumptions is offered, and its value to managers as a heuristic device for theory development is discussed. Finally, a model is considered which simulates first-order change in the form of socio-technological change as a driver of second-order change as related to the disruption of power relationships in society and organisations. This model is taken to represent the causal structure underlying the emergence of the paradigms described in the paradigm-differentiation model. Having outlined the rationale behind the research and a justification for its importance, a theory of paradigms is now considered.

■ Theory of paradigms

At the heart of any discussion of how to frame change and differentiation in scientific epistemologies and ontologies is the need to relate change in the natural sciences to that in the social sciences and to make explicit the tensions amongst and between these bodies of literature. An example of these tensions is offered by Latour. He (Latour 2000) explains that the social sciences have typically over time ‘wrong-headedly’ tried to imitate the natural sciences:

Most of the social sciences were invented, a century ago, to short-cut political process after many years of insufferable wars and

revolutionary strife. If we have a Society which is already composed as a single whole and which can be sued to account for the behaviour of actors who do not know what they are doing, but whose unknown structure is visible to the keen eyes of the trained social scientist, it then becomes possible to embark on the huge task of social engineering in order to produce the common good, without having to go through political means. We find here the genealogy of this famous Society whose demise is not everywhere visible, not so much because of the advent of networks and global markets, but because it has become politically and scientifically scandalous. From Comte to Bourdieu through Durkheim and Parsons, this dream of legislating in order to by-pass an impossibly fractious political arena by using the knowledge of what Society is – what manipulates the people in spite of themselves – has formed the core vocation of most social sciences (apart from the tiny schools of interpretative sociology, ethnomethodology and symbolic interactionism, that Bauman places in a different family). In this strange political dream of short-cutting politics, we find not only the notion of the social we had to dispute above, but also this extravagant scientism we have also been criticizing throughout. (pp. 117-118)

According to Latour (2000), the social sciences' quest (to reveal the hidden structure which manipulates agents) has sought to apply similar thinking to that of natural scientists' differentiation between primary and secondary qualities of phenomena (the former relating to real substance making up nature, such as particles, atoms, genes, and the latter relating to subjective representations of this same universe). Latour's example is but one of a host of theoretical tensions running between and through scientific literature. Science (both natural and social) exists within society, and it is in within this complex milieu that Burrell and Morgan (1979) sought to differentiate paradigms of scientific thought according to what they took to be fundamental ontological and epistemological assumptions of scholarly research.

Arguably, the schema offered by Burrell and Morgan (1979) can be considered to reflect longstanding debates in social-science literature germane to normative versus non-normative science and as to what science, social or natural, represents. A rationale is now offered for the inclusion of two other paradigms, namely the radical verificationist paradigm and the radical emergence paradigm, which may reflect contemporary changes in science. In addition, I consider a further paradigm which extrapolates these changes and represents them as a convergence of values.

The functionalist paradigm in Burrell and Morgan's (1979:26) schema seeks to provide explanations 'of the status quo, social order, consensus, social integration, solidarity, need satisfaction and actuality' from a 'standpoint which tends to be realist, positivist, determinist and nomothetic', offering 'essentially rational explanations of social affairs' rooted in the sociological positivism paradigm or the attempt 'par excellence, to apply the models and methods of the natural sciences to the study of human affairs.' Problem-oriented as it is, functionalism therefore seeks to provide practical solutions to practical problems and is 'usually firmly committed to a philosophy of social engineering as a basis for social change', emphasising the maintenance of order, equilibrium and stability in society, or regulation and control of social affairs (Burrell & Morgan 1979:26).

In terms of Burrell and Morgan's (1979) ontological differentiation between the assumptions of social-science research which takes objective versus subjective assumptions as one of two axes of difference (Figure 2), the functionalist paradigm is

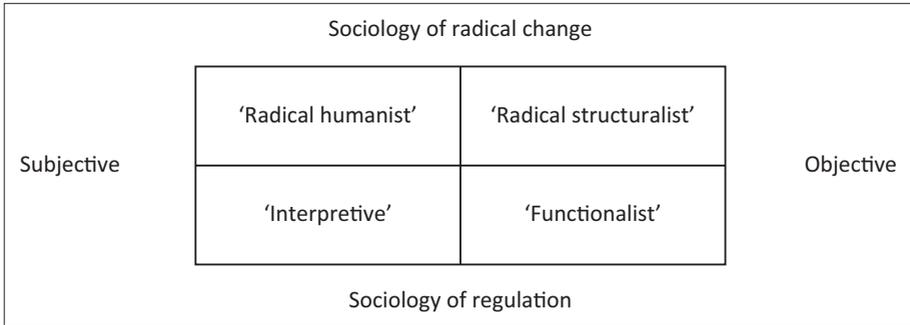


FIGURE 2: Burrell and Morgan's (1979:22) paradigmatic differentiation schema.

differentiated from the interpretivist paradigm. However, both of these axes are considered to relate to the 'sociology of regulation' or status quo in contrast to the radical humanist subjective and radical structuralist objective paradigms which relate to the 'sociology of radical change'. As shown in Figure 2, the verificationist paradigm is considered to be on the objective axis but to be more radically oriented toward change than the radical structuralist paradigm.

■ The epistemological tenet of positivism

One difference between the subjective and objective paradigms is their relationship toward the objective paradigm's epistemological tenet of positivism. According to Burrell and Morgan's (1979) analysis, the subjective paradigm's anti-positivist tenets contrast epistemologically with positivism, rejecting positivism's claims that 'hypothesised regularities can be verified by an adequate experimental research programme' (verificationists) or that hypotheses can only be falsified (falsificationists). The radical

verificationist paradigm is taken to derive epistemologically from the positivist verificationist tradition in the sciences described by Burrell and Morgan (1979). However, due to radical change in methods over time, including those associated with probabilistic innovation, less emphasis is now placed on falsificationist logic and notions of dichotomisation imposed on evidence evaluation whilst the focus is rather on probabilistic evaluation and multiple perspectives of evidence (Campbell & Fiske 1959), based on large volumes of data, synthesis and analysis in real time. Management research can draw useful heuristics for the development of theory in Burrell and Morgan's (1979) schematic differentiations, but these need to be updated to incorporate ideas from contemporary management contexts. Management applied to public-health emergencies provides important contemporary insights which highlight the importance of epistemological and ontological assumptions and the need to include emergent paradigms that are reflecting technological change.

Recent deliberations concerning ethics in the wake of public-health emergencies such as the Ebola outbreak have affirmed the deliberative democratic approach with maximised real-time stakeholder engagement in research and policy making as well as the need for proactive democratic deliberation in advance of such events (Fenton, Chillag & Michael 2015). The rights of populations to have scientific findings fully disclosed and to have maximised transparency concerning developments that influence them in an era of rapid technological developments, including for example areas such as genetic engineering (Kimmelman 2008), have important implications

for scientific assumptions and notions of the incommensurability of paradigms. Kuhn's (1962) paradigm theory suggests that normal science processes can cause paradigm change through changes in scientists' value systems, and it is in relation to this notion that anti-positivism and other tenets of differentiation of scientific thought need to be placed.

Anti-positivism contests the positivist tenet that knowledge creation is fundamentally cumulative in nature. Anti-positivism can take different forms but is 'firmly set against the utility of a search for laws or underlying regularities in the world of social affairs' (Burrell & Morgan 1979:4). The social world, for anti-positivists, is therefore relative and can only be understood from the point of view of individuals who are directly involved in it. From this perspective, social science is taken to be a subjective, not objective, enterprise as anti-positivists 'tend to reject the notion that science can generate objective knowledge of any kind' (Burrell & Morgan 1979:4). In a world increasingly affected by socio-technological change, it is perhaps necessary to interrogate the usefulness of the four paradigmatic differentiations offered by Burrell and Morgan, and to update these to take into account contemporary ontological and epistemological dynamics.

Anti-positivist assumptions may be associated with the interpretivist and radical humanist paradigms mooted by Burrell and Morgan (1979), but the (more) radical emergence paradigm is taken to reflect a more complex relationship with anti-positivism. Anti-positivism has less to do with the rejection of positivistic relationships

which emerge from the subjective engagement of human consciousness with empirical phenomena and more with the prioritisation of the subjective forces of the human intellect. These forces are the subject of a fast-growing body of literature related to collective intelligence and its emergent properties, which are increasingly recognised as key to driving innovative scientific discoveries (Rosenberg 2015).

■ **Emancipatory science contingent on critical-theory contributions**

Innovative scientific discoveries can be emancipatory if stewarded by an engagement with critical theory. Critical theory of technology with its links to the Frankfurt School of critical theory (Feenberg 1991) argues that technological change does not necessarily force a deterministic choice between human values and technological advancement (substantivism) but can instead contribute to broader democratic participation in social choices. Technology is adapted to social and political systems, and technological systems are not neutral (the tenet of instrumentalism) but contribute to socio-political agendas. Hence, critical theory of technology is a 'political theory of modernity with a normative dimension', extending from Foucault and Habermas a tradition which (Feenberg 2009):

[A]dvances in the formal claims of human rights take centre stage while in the background centralization of ever more powerful public institutions and private organizations imposes an authoritarian social order. (p. 147)

Further, with the 'rise of the environmental movement, the struggle of AIDS patients for access to experimental drugs, and the re-

inventions of the Internet by its users as a communication medium', a critical approach to technology has gained much ground as political dimensions of technology become increasingly clear, according to Feenberg (2009:147). Global South populations are disproportionately exposed to catastrophic events such as the AIDS epidemic and other health challenges with inequalities in the contribution of science. Burrell and Morgan's (1979) schema can be extended to capture ontological and epistemological aspects related to technological emergence and its contributions to social and natural sciences, particularly in terms of its potential to radically change research processes and contribute to the democratisation of science.

The operationalisation of collective intelligence based on the involvement of populations, not only in high-volume big data, information and knowledge collection but also in analysis and problem-solving may offer radical potential for real-time problem-solving, (Callaghan 2015) on the back of rapidly developing technology that is driving radically enhanced connectivity such as crowdsourcing, crowdsourced research and development (R&D) and the use of social media. The front line in theory development in the radical emergence paradigm has arguably been found in disaster-management literature, which has highlighted the potential of social media (Alexander 2014) and crowdsourcing (Callaghan 2016b) as well as the importance of complex adaptive systems (Coetzee, Van Niekerk & Raju 2016) and its emergent properties in solving research problems under intense time constraints.

Crowdsourcing, or crowdsourced R&D, has demonstrated proof of its effectiveness in medical research (Allio 2004; Adams 2011; Armstrong *et al.* 2012; Callaghan 2015) as a powerful

enabler of research productivity. Internet-based platforms using geographical information systems (GIS) and other forms of emergent technological applications are proliferating globally (Aye *et al.* 2016). These platforms offer opportunities for integrating human-swarm problems (Rosenberg 2015) with artificial intelligence applied to crowdsourced data (Davies 2015), resulting in a radically changed research landscape. The potential for the radical emergence paradigm to solve societal problems and to provide emergent alignment with the values of radical humanism and critical theory derives from its epistemological nature as an emergent paradigm and from the notion that its emergent properties are inherently 'subjective' and not based on an ordered logic.

The subjectivity associated with the emergent properties of the crowd is well documented as crowds can be irrational and behave like mobs (Le Bon 1896; Surowiecki 2004), and it is only under certain conditions that crowds manifest collective intelligence. This subjectivity differentiates the radical emergence paradigm from the radical verificationist paradigm, which, although enabled by radical technological progress and the use of the crowd or inclusive populations to engage in scientific research as well as research verification and ethical scrutiny, is focused primarily on the objective accumulation of knowledge and its verification. The verificationist paradigm is therefore a counterpoint to the radical emergence paradigm and is uniquely more suited to managing the chaotic conditions under which emergent problem-solving can arise as checks and balances are applied through the transparent scrutiny of research by populations.

However, in contrast to Burrell and Morgan's (1979) rigid conceptualisation of paradigm incommensurability, Campbell and Fiske's (1959) notion of increasing validity through the complementarity of perspectives is taken to be more realistic, given the nature of the literature synthesised here as literature on the verificationist and radical emergence paradigm ultimately predicts a convergence in epistemological and ontological objectives. This convergence is taken to be the coming together of scientific objectives to support humanist emancipation or a process of 'closing the circle' whereby the convergence of science and the needs of the crowd, or populations, is ultimately attained, following the principles of critical theory of technology, namely broader democratic participation in technological choices (Feenberg 1991). This is essentially the attainment of what critical theorists have long advanced as the emancipatory potential of critical engagement (Alvesson & Willmott 2002). However, it is epistemologically enabled through the democratisation of the processes of science and the power inversion resulting from the engagement of the crowd to exponentially increase data, information and knowledge aggregation and problem-solving in science.

■ The convergence of normative humanist epistemologies and ontologies

The notion of the convergence of radical emergence and radical verificationist paradigms around what is essentially a normative humanist epistemology and ontology is derived here from theory. This prediction has its roots in analysis of trajectories of

theory development, which lends this prediction both inductive and deductive processes, the former associated with extrapolation of the radical emergence paradigm and the latter with forms of logic associated with the radical verificationist paradigm. The transcendence paradigm is therefore considered to be premised on humanist assumptions associated with the relatively complete democratisation of science whereby the needs of populations and their concerns (the affected) are essentially wedded to the production of knowledge or knowledge creation. This position holds important implications for power relationships as well as for the convergence of natural and social science in terms of shared values.

Technologically enabled methodologies also enable metaheuristic processes (Bianchi *et al.* 2009; Blum & Roli 2003), which can radically accelerate research productivity. What characterises the radical emergence and verificationist paradigms are their exposure to forces of the democratisation of science with powerful epistemological roots in emergent systems. Some have described this emergent process as the manifestation of collective intelligence.

The emergent literature on collective intelligence is increasingly incorporating burgeoning research on swarm intelligence (Bonabeau & Theraulaz 2000; Callaghan 2016c). Furthermore, theory development around the use of probabilistic algorithms such as artificial immune systems (Farmer, Packard & Perelson 1986) as well as theory related to how the emergent collective intelligence of crowds can solve knowledge-aggregation problems

related to market-price derivation (Fama 1970, 1995). Probabilistic innovation theory, for example, seeks to identify underlying mechanisms and causal channels common across these literatures and focuses these on research acceleration based on maximising connectivity and collaboration between stakeholders. Theoretical developments across these fields suggest that the radical emergence and verificationist paradigms offer a useful differentiation of contemporary paradigms on the basis of ontological and epistemological differences.

With its roots in the functionalist paradigm but with a more radical, change-oriented ontological and epistemological agenda, the radical verificationist paradigm is premised on the emergence of scientific methodologies associated with high-volume data collection, synthesis and analysis as well as the influence that these new processes, which are enabled by rapid technological developments, are having on science. Post-normal science (Funtowicz & Ravetz 1994) theory is based on scepticism of scientific research outputs such as those related to climate change, which have been inconsistent and contradictory. These findings hold serious consequences for stakeholders and suggest the verification and scrutiny of scientific research and its processes by stakeholder populations, or the 'crowd'. As such, the verificationist paradigm is grounded in ontological assumptions related to objective reality and epistemological assumptions related to knowledge creation enabled by large volumes of data made possible by the engagement of crowds in the research process itself.

■ The usefulness of the new paradigm

The importance of this paradigm is evident in the context of disasters where data required for solving problems are only available after the disaster has unfolded. In such contexts, disaster-management processes have to create ‘maps’ and a newfound ‘memory’ of the unfolding problem, and high volumes of data from crowdsourcing and social media have the potential to contribute not only to knowledge of the situation but used to problem-solving. Such disaster situations offer appropriate examples of verificationist paradigm contexts as large volumes of data are taken to offer real and objective inputs into problem-solving, but given this large volume of inputs, the verification and quality management of knowledge is the dominant challenge faced in these processes. Radical change is enabled in this paradigm as, without the benefit of time, problems need to be solved instantaneously. There are a host of theoretical frameworks which offer insights into how problem-solving can be enabled within this paradigm.

To illustrate explanations, the case of an Ebola outbreak might be useful. Given that Ebola is a highly infectious virus, rush-hour conditions and the global transport system could endanger the lives of millions if it were to spread to a modern subway system. The verificationist paradigm, premised on the technological enablement of large data input, synthesis and analysis, provides an ontological and epistemological space for theory development that is uniquely matched to these kinds of knowledge-creation problems and contexts. Solving the problem of Ebola would then require problem-solving in real time, to provide solutions in hours and days (Callaghan 2016a), not months or years, as perhaps typical of the functionalist

paradigm. The project process would need to be ‘crashed’ as the human costs would be too high to wait for resources to be mobilised and to arrive. Only very high volumes of information and knowledge together with a system of verification, which sifts and identifies useful information and creates knowledge around the problem in real time, could arguably provide for this kind of problem-solving.

Theory focused on this kind of problem-solving is growing. For example, swarm intelligence theory, which relates to the collective behaviour of decentralised, self-organised systems (Kennedy, Eberhart & Shi 2001) offers a host of metaheuristic principles (Blum & Roli 2003) useful for real time problem-solving. These include ant-colony algorithms (Bonabeau & Théraulaz 2000; Garnier, Gautrais & Theraulaz 2007) which can be applied to managing inputs and mapping knowledge to the shortest paths toward a solution. They also include other algorithms such as artificial immune-systems theory (Farmer *et al.* 1986), bat algorithms (Yang 2010), particle swarm optimisation (Kennedy 1999), differential evolution (Storn & Price 1997), genetic algorithms (Dorigo 1993) or glow-worm swarm optimisation (Krishnanand & Ghose 2005).

Derived from principles common to the behaviour of swarms and populations, this body of theory offers the potential for managing large volumes of data in support of real-time problem-solving, particularly in terms of identifying and verifying relatively more or less useful inputs under real-time conditions of problem-solving. Given that solving problems in real time relies on theory related to these mechanisms, which operate probabilistically to manage high volumes of knowledge input, this body of theory is also known as probabilistic innovation theory (Callaghan 2014). The term

probabilistic innovation derives from the notion that, as the volumes of problem-solving input are increased exponentially, the probability of solving a targeted problem also increases. In the Ebola example, researchers (problem solvers) have little choice but to engage the expert crowd immediately and also to engage human problem-solving inputs beyond the expert crowd. The principles of swarm intelligence are already in use across areas like data mining, electronic engineering, robotics and molecular biology (Yesodha & Amudha 2012). These, together with other methods related to high-volume knowledge creation, are considered to fall within the verificationist paradigm as their epistemological characteristics are congruent with this paradigm.

The verificationist paradigm is however not limited to conditions of real-time research but to any context in which high-volume knowledge creation is enabled, where probabilities of radical innovations or change are heightened and where the primary challenge is the verification and selection of useful knowledge in high-volume data and information contexts. Nevertheless, scrutiny and accountability in contexts high in knowledge creation on the basis of the crowd's engagement and transparency are key to these processes. Also, cultural values are considered key to optimistic perspectives on technological change. Values associated with democratic participation, as stressed by critical theory of technology (Feenberg 1991), further provide a normative bedrock on which theory can synthesise natural-science objectivism with the social and ensure science in the service of humanist values.

■ The disruption of power relationships

Whereas the verificationist paradigm exists currently, it is perhaps also necessary to map its trajectory into the future. This paradigm is explained in terms of literature and methodologies which already exist, and the schema offered here is a descriptive one, seeking to offer a useful differentiation between paradigms. However, changes having given rise to the radical verificationist as well as radical emergence paradigms can arguably be extrapolated, and in time, another paradigm will develop, which for the purposes of Chapter 3 is termed the transcendence paradigm.

Arguably, increasing connectivity between individuals and their in-groups and populations will ultimately result in convergence between the verificationist and radical emergence paradigms, the latter related to the development of emergence theory and the former to objective realist applications of high-volume crowd engagement and accountability as well as ethical and stakeholder checks on both the validity of processes as well as the extent to which the needs of populations are met by research. The ultimate convergence of the radical emergence and verificationist paradigms will perhaps take the form of boundary collapse as further radical change is enabled which no longer separates emergent properties from objective verification. The differentiation of paradigms in this way also reflects the dynamics of power. Whereas the functionalist paradigm exits perhaps as the paradigm with the least normative assumptions, the radical emergence and radical verificationist paradigms represent an inversion of power relationships in societies as the monopoly power of capital is crowded out by the power of knowledge. The monopoly power of

industry premised on the secrecy of R&D and innovation is likewise crowded out by the power of populations as they engage with both the research process itself and its ethical scrutiny.

According to Foucault (1982:791–792), however, a society without power relations ‘can only be an abstraction’, and the analysis of power relationships in a given society, their historical formation, their source of strength (or fragility) and conditions necessary to ‘transform some or to abolish others’ is therefore necessary. The transcendence paradigm is taken ultimately to reflect to its fullest extent the democratisation of science as considered by critical theory of technology (Feenberg 1991) and therefore an alignment between power and the needs of populations, which needs can be supported by science. Arguably the power of markets can ultimately be balanced by ethical scrutiny and the power of the ‘crowd’ to demand that its most important needs be met. Given climate change and other ecological threats, the current model of scientific research (Funtowicz & Ravetz 1994) requires maximised transparency, and the transcendence paradigm is premised on an epistemological paradigm of transparency and accountability in knowledge creation where the objectives of probabilistic innovation theory have ultimately been attained or where research processes have essentially provided real-time problem-solving, and many resource problems are essentially a thing of the past. However, critical theory is considered an important guide to the normative convergence of the radical emergence and radical verificationist paradigms as attainment of the transcendence paradigm is considered to be the triumph of humanist values over deterministic ideologies.

The transcendence paradigm stands in contrast to the emergence of the paradigm that Malthus predicted. Malthus (1798) predicted the emergence of a paradigm of population growth constrained by inexorable physical laws where prescribed bounds of nature constrain human advances:

Through the animal and vegetable kingdoms, nature has scattered the seeds of life abroad with the most profuse and liberal hand. She has been comparatively sparing in the room and the nourishment necessary to rear them. The germs of existence contained in this spot of earth, with ample food, and ample room to expand in, would fill millions of worlds in the course of a few thousand years. Necessity, that imperious all pervading law of nature, restrains them within the prescribed bounds. The race of plants, and the race of animals shrink under this great restrictive law. And the race of man cannot, by any efforts of reason, escape from it. Among plants and animals its effects are waste of seed, sickness, and premature death. Among mankind, misery and vice. The former, misery, is an absolutely necessary consequence of it. Vice is a highly probable consequence, and we therefore see it abundantly prevail; but it ought not, perhaps, to be called an absolutely necessary consequence. The ordeal of virtue is to resist all temptation to evil. (p. 1)

Whereas Malthus (1798) claims an impervious all-pervading law of growth in nature constrains regarding human (and perhaps all) organisms, neither human agency nor trajectories of human scientific endeavour are considered. Commensurate with the advent of industrialisation, changes in work drove changes in societal structure and also academic endeavour (Callaghan 2016c). Arguably, a new paradigm in values emerged subsequent to industrialisation, including an awareness of power relationships associated with the dominance of capital in industrial production and its power over more homogenous and relatively powerless labour. Burrell and Morgan's (1979) radical structuralist paradigm

reflects these changes, but it does not capture the second order change, or power-relationship disruption, in societies and organisations, which are a result of first-order, emergent socio-technological change.

The radical structuralist paradigm seeks to advocate a sociology of radical change from a objectivist perspective, sharing similarities with functionalists but with a commitment to 'radical change, emancipation, and potentiality, in an analysis which emphasises structural conflict, modes of domination, contradiction and deprivation' (Burrell & Morgan 1979:34). Arguably, this perspective, via the verificationist paradigm, can be extended to consider a social and research world in which radically increased knowledge and connectivity have increased the productivity of knowledge work and in which the knowledge worker and his or her knowledge rivals the power of capital, or the firm.

The radical structuralist paradigm approaches issues from a standpoint that tends to be 'realist, positivist, determinist and nomothetic', and in contrast to the focus on consciousness by the radical humanists, the focus of radical structuralists is 'structural relationships within a realist social world' (Burrell & Morgan 1979:34). The radical verificationist paradigm is taken to extend these assumptions whilst taking into account the radically enhanced capabilities of knowledge associated with emergent technology and its social and research effects. What differentiates the radical emergence and radical verificationist paradigms from Burrell and Morgan's (1979) other four paradigms are certain causal mechanisms, which are represented in Figure 4. In order to argue

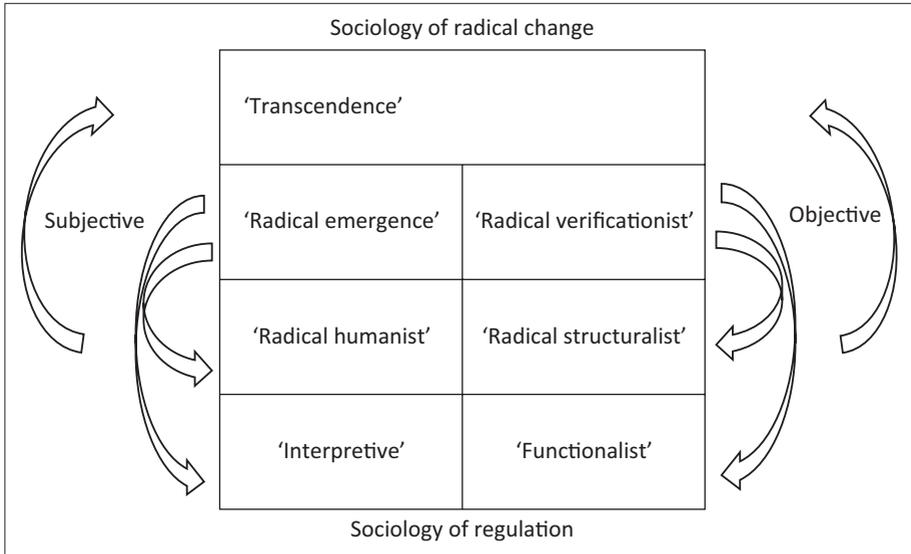


FIGURE 3: Contemporary and future paradigm differentiation.

for the extended schema (Figure 3), it is considered necessary to identify certain causal relationships which arguably give rise to the additional paradigms.

The radical structuralist paradigm, in particular, as well as the other three paradigms offered by Burrell and Morgan (1979) are also taken to not be independent of temporal legacy effects. For example, legacy effects can be associated with the formation of this schema on the back of the need for a normative paradigm to address the inhumanity associated with industrialisation and the powerlessness of the working classes in the face of monopoly capital in a period when capital is dominant. Burrell and Morgan's (1979) schema is therefore largely premised on ontological and epistemological differentiations prior to the disruption of social life and academic

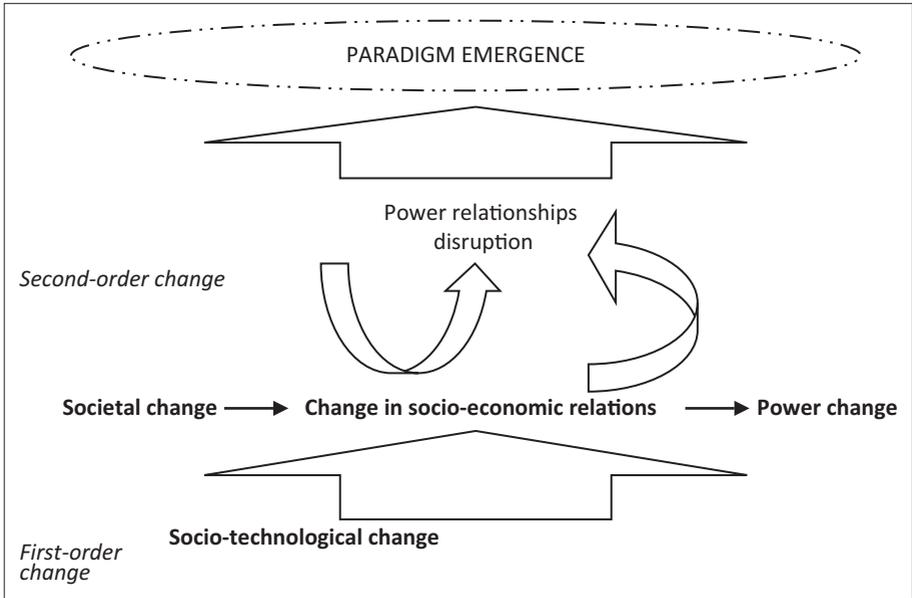


FIGURE 4: The causal structure of post-industrial paradigmatic change.

research by emergent technologies and a new era in technologically enabled connectivity even if these effects have yet to fully work their way through academic systems.

Contemporary forces shaping the emergence of a paradigm are illustrated in Figure 3, which offers first-order socio-technological change as a causal driver of second-order change in the form of the disruption to power relationships, which is due primarily to the power of technology to leverage knowledge as a factor of production. These causal mechanisms, or channels, are considered to underpin both radical emergence and radical verificationist paradigms, and these are termed post-industrialist paradigms, given that their effects relate to radical change enabled by new technology. As stressed previously, although many have considered technological change to

be threatening to emancipatory human values, following Feenberg's (1991) critical theory of technology tenets, this pessimism is taken to be unwarranted on condition that broader participation in technological choices is enabled. Ironically, it may be the technological developments themselves which can increase the connectivity through which these new paradigms of democratisation, enhanced transparency and ethical accountability are made possible. Arguably, much has happened since Burrell and Morgan's (1979) work, and subsequent changes have provided more insight into their schema and the aspects that need to be incorporated in order to bring it up to date with contemporary ontological and epistemological implications as well as future projected change.

■ Structuralist dynamics

Work in the radical structuralist paradigm has typically shared a focus on the 'deep-seated internal contradictions' in societies and work contexts as well as the structure and analysis of power relationships. Its focus was also on a shared 'view that contemporary society is characterised by fundamental conflicts which generate radical change through political and economic crises', which requires humankind's emancipation from the social structures within which they live (Burrell & Morgan 1979:34). The development of the radical structuralist paradigm owes its development primarily to Marx and also to a lesser extent to Weber, in particular the synthesis of their work described as 'conflict theory'. It also owes its development to those inspired by Marx, including Lenin, Plekhanov, Buhharin and other Marxist sociologists of the New Left (Burrell & Morgan 1979). This body of theory, however, which may comprise much of the

bedrock of social-science thinking, has not adequately or sufficiently integrated the effects of the knowledge revolution as it has done with those of the industrial revolution. The verificationist paradigm seeks to offer this additional perspective. The transcendence paradigm can further be derived through the logical extrapolation of conditions associated with the radical emergence and radical verificationist paradigms with a particular reference to socio-technological changes and a trajectory of increasing connectivity. However, utopian visions of a fuller humanist democratisation of workspaces and societies require circumspection, and critical theory is considered an important lens through which to envision these changes as these changes extend a normative humanist perspective and locate changes in values in relation to temporal change and the industrial and knowledge-production revolutions.

At the intersection of sociology of regulation and subjectivist perspectives in Burrell and Morgan's schema (1979:28) is the interpretivist paradigm, concerned with understanding the world as it is, or at the level of subjective experience, from the frame of reference of the participant, tending to be 'nominalist, anti-positivist, voluntarist and ideographic' (Burrell & Morgan 1979:28). The radical emergence paradigm is taken to build on this, but it integrates effects related to increased connectivity as well as subjective characteristics of crowds, or groups of people. According to the interpretivist paradigm, social reality, if recognised as existing outside of individual consciousness, is regarded 'as being little more than a network of assumptions and intersubjectively shared meanings.' Key to the academic project is a quest for the

‘fundamental meanings which underlie social life’, drawing from the German idealist tradition of social thought and the work of Kant which ‘emphasises the essentially spiritual nature of the social world’ (Burrell & Morgan 1979:28, 31).

Neo-idealist thought sought to re-invigorate the idealist tradition, and Weber and Husserl are examples of those who develop this thinking as a basis for social analysis (Burrell & Morgan 1979). Steffy and Grimes (1986) make the following observation in this regard:

[It] should be noted, however, that the interpretive position may be as suspect as the empirical-analytic position, both in terms of its criticisms of the natural science approach and in the adequacy of its own methods. (p. 323)

The radical emergence paradigm is premised on the value of subjectivity and meaning in human life, and despite the fact that capturing the technological effects of connectivity is also associated with the radical verificationist paradigm, it is quintessentially humanist. Its emergent epistemologies, which are based on the increasing engagement and harnessing of population inputs, are expected also (as in the case of the radical verificationist paradigm) to be associated with increasing accountability to society. The radical emergence paradigm therefore extends the normative perspectives of radical humanism.

■ Humanist effects

The radical humanist paradigm seeks to develop a sociology of radical change from a subjectivist perspective. As such, it is aimed

at ‘overthrowing or transcending the limitations of existing social arrangements’, taking consciousness to be ‘dominated by the ideological superstructures’ with which people interact and which ‘drive a cognitive wedge’ between individuals and their true consciousness, a wedge of ‘alienation’ or ‘false consciousness’ which prevents ‘true human fulfilment’ (Burrell & Morgan 1979:32). The radical emergence paradigm re-envisioning human work and the research process itself on the basis of emergent re-evaluations of its very assumptions but with the further assumption that the collective intelligence of populations which arises from increased connectivity will ultimately drive out the cognitive wedge between individuals and true consciousness and ultimately enable the integration of humanist values with working life and societal functioning. However, due to increasing connectivity and broader participation in technological change (Feenberg 1991) on the basis of humanist values, the radical verificationist and radical emergence paradigms are taken to ultimately converge and produce transcendence conditions. Transcendence then produces conditions under which the epistemological circle is closed, and human life is lived to maximise human potential. Connectivity ultimately enables shared consensus around humanist values and science itself. This ultimately predicts convergence between normative values and radically accelerated research productivity in service of human needs.

The concern of theorising in the radical humanist paradigm is typically a release from the constraints that existing social arrangements place on human development. It therefore entails a

concern with critique of the status quo, a view of society as ‘anti-human’ and arguments concerning the need for humans to transcend existing social patterns to realise their full potential (Burrell & Morgan 1979:32). Radical humanists therefore typically concern themselves with radical change, modes of domination, emancipation, deprivation and potentiality. They are less concerned with notions of structural conflict and contradiction (which are associated with the radical structuralist paradigm), instead focusing on ideas drawing from notions of human consciousness and German idealist thought typically associated with Kant, Hegel, the phenomenological perspectives of Husserl as well as the work of Frankfurt School theorists like Habermas and Marcuse, amongst others (Burrell & Morgan 1979). The radical emergence paradigm is premised on changes in societal and organisational power relationships and an increasing exposure of all practices and conditions to the crowd, which is due to an increasing emergent connectivity that is coupled to maximised transparency that is enabled by rapidly developing technology. Ultimately, the transcendence paradigm suggests that this trajectory of increasing connectivity may result in the transcendence of values, or a social and scientific world in which humanist ideas are widely shared and provide the rationale for human existence and individual autonomy, or a world in which open and transparent contestation of ideas has enabled widely shared consensus.

What those working within the radical humanist paradigm seem to share is a ‘common concern for the release of

consciousness and experience from domination by various aspects of the ideological superstructure of the social world within which men live out their lives', therefore with the goal of changing the social world through a 'change in modes of cognition and consciousness' (Burrell & Morgan 1979:33). The radical humanist perspective of organisations has however also developed into anti-organisation theory. Burrell and Morgan (1979) explain this further as follows:

The radical humanist paradigm in essence is based upon an inversion of the assumptions which define the functionalist paradigm. It should be no surprise, therefore, that anti-organisation theory inverts the problematic which defines organisation theory on almost every count. (p. 33)

In contrast to perspectives which define themselves as in opposition to other perspectives, the radical emergence paradigm seeks to break with this notion and instead stresses the emergent nature of subjective engagement with the superstructure of the social world and how it is shaped by economic relationships and imperatives. Given humanist re-engagement, or the reversal of industrialised alienation associated with industrial work, and the emergence of knowledge work and the power of the specialist knowledge worker in a context of rapid technological change (Callaghan 2016b), emergent forms of living are considered by the radical emergence paradigm, but its normative assumptions draw on critical theory and extend the radical humanist perspectives. Novel forms of emergent oppression can result from the power of knowledge, and the emergence of new elites in organisational and societal contexts may require critical-theory leadership in order to balance these

new power relationships, using increased transparency and scrutiny of the crowd.

■ Paradigm incommensurability

Central to the ontological and epistemological assumptions of both the radical emergence and radical verificationist paradigms is therefore the acknowledgement of social and research changes enabled by emergent technology (Feenberg 1991) and social changes related to these effects. These include acknowledging the increasing global social connectivity, predicted to ultimately converge and lead to the emergence of the transcendence paradigm. These ideas, however, contest Burrell and Morgan's (1979) notions of paradigm incommensurability and place their analysis in the era of post-industrialised social-science theory which has not sufficiently incorporated the knowledge-revolution effects of power disruption and social connectivity. Probabilistic innovation theory posits a world of research breakthroughs where radical improvements in the collection, synthesis and analysis of data result from exponentially increased engagement with socially important research problems, and critical theory is key to steward these processes so as to avoid threatening the side effects of technological advancements.

With respect to technological advances Feenberg (2005) asks the following, from the perspective of critical theory of technology:

What can be done to reverse the tide [*threatening side effects of technological advances*]? Only the democratisation of technology can help ... The spread of knowledge by itself is not enough to accomplish this.

For knowledge to be taken seriously, the range of interests represented by the actor must be enlarged so as to make it more difficult to offload feedback from the object onto disempowered groups. But only a democratically constituted alliance of actors, embracing those very groups, is sufficiently exposed to the consequences of its own actions to resist harmful projects and designs at the outset. Such a broadly constituted democratic technical alliance would take into account destructive effects of technology on the natural environment as well as on human beings. (p. 55)

Arguably, paradigm incommensurability can therefore be dangerous in a world of rapidly developing technological capabilities with science at the centre of these developments. Other attempts have been made to reconcile the notion of paradigm incommensurability with a world that cannot be 'fixed' into firewalled differentiations. These attempts have perhaps reduced to agreements the different paradigmatic perspectives that can be useful heuristic devices that are helpful in theory development. In contrast to Burrell and Morgan's (1979) rigid arguments for the incommensurability of paradigms, Lewis and Grimes (1999) have, for example, suggested a multi-paradigm approach to complex and paradoxical phenomena in order to harness disparate theoretical perspectives in support of meta-triangulation in theory building, an approach followed by a host of theorists (Bradshaw-Camball & Murray 1991; Grimes & Rood 1995; Hassard 1991; Schultz & Hatch 1996; Willmott 1993b; Weaver & Gioia 1994; Ybema 1996). Multi-paradigm theorists have since utilised paradigms as heuristics to interrogate phenomena, which is helpful as it offers different perspectives of what is under study. Multiple ontological and epistemological

perspectives are helpful as they disrupt the hegemony of ideologies, or totalitarian agendas, whether of the corporate culturism (Willmott 1993a) type or of societal versions.

The new paradigms described here relate directly to the inversion of power relationships as forces of democratic engagement disrupt the monopolies of firms over problem-solving, and new forms of technological connectivity empower citizen science and previously powerless stakeholders to wield greater power and to hold decision makers accountable across contexts.

■ Conclusion

As a CMS project which drew its inspiration from the field of management, from the challenges facing South Africa and from the need for theory to address these challenges, Chapter 3 sought a synthesis of seminal and contemporary literature in order to supplement Burrell and Morgan's (1979) schema of ontological and epistemological assumptions underlying knowledge creation in the social sciences. By so doing, Chapter 3 sought to contribute to the CMS literature. Although the discussions in Chapter 3 have global relevance, fundamental inequalities associated with the accelerating digital divide between the physical and metaphorical Global North and South were taken to have the potential to imperil the emancipatory project. Conditions of organisational life in South Africa reflect these challenges acutely. Multinational firms, driven and embodied by management theory, span this digital and geographic divide,

drawing both profits and resources across it, which can contribute to increasing inequality along what seem to be geopolitical fault lines. In contexts such as that of South Africa, populations are particularly vulnerable to increasing power inequalities associated with the digital divide. Chapter 3 therefore aspired to provide a useful analysis of how technological change and the management realities acutely experienced in South African organisations, society and its academe could be accommodated by building on Burrell and Morgan's (1979) theoretical schema. Further, acknowledging dystopian predictions, principles from critical theory of technology were also incorporated in order to argue that only with a grounding in CMS values could management theory ultimately transcend digital divisiveness and steward technological progress towards an ultimate state of transcendence.

The core ideas offered in Chapter 3 bear repeating, and a final summation is now provided. In contrast to pessimistic notions of incommensurability between humanistic values and technological advancement, this research took as its stance the critical theory of technology (Feenberg 1991), which argues that broader democratic participation in technological choices anchored by humanist values and longstanding emancipatory agendas (Alvesson & Willmott 2002) is a core feature of the rapidly developing technological milieu within which contemporary organisations are nested. Drawing from a host of different streams in the literature, the objective of Chapter 3 was ultimately to build upon Burrell and Morgan's (1979) schema of paradigmatic differentiation in order to offer a heuristic argument of paradigm

differentiation premised on technological advances and their overarching societal effects as well as their epistemological and ontological implications. However, at the heart of arguments made in Chapter 3 was the notion that theory development around technological progress in human societies may need to incorporate a critical theory lens in order to steward progress in support of human values and human needs. Critical theory of technology was considered an important perspective in that it incorporates the potential for the democratisation of science to hold research to account. It is hoped that the argument offered here, which sought to incorporate certain contemporary epistemological and ontological realities, may be useful as a heuristic to provoke ideas and theory relevant to management as a field. Certain limitations, however, are acknowledged, not least of which is the fact that attempting any differentiation of the assumptions of different academic fields is difficult as one has to offer an overarching logic which is compelling enough to make sense of the tremendous heterogeneity in academic ontological and epistemological perspectives. The rationale applied here was premised on qualitatively differentiating on the basis of the ontological and epistemological forces predicted by a wide body of theory since the Burrell and Morgan era – and not only contemporary change but extrapolated changes in times to come. This differentiation is therefore theory driven, but it remains to be seen to which the extent the predictions of these bodies of theory are borne out. Further research is recommended in the spirit of provocative theory development to extend theoretical horizons related to paradigm differentiation as theory

development needs to cover the ground before theory testing can follow.

■ Chapter 3: Summary

Burrell and Morgan's paradigm differentiation offered what has arguably been a useful heuristic for certain management-theory development, notwithstanding controversy associated with issues of paradigm commensurability. With reference to challenges faced in the development of South African management theory and practice, Chapter 3 seeks to contribute to the critical management studies literature by locating Burrell and Morgan's schema in relation to contemporary changes in societies and organisations as well as in relation to ontological and epistemological changes associated with emergent technology. Emergent technology is considered here to represent first-order change, which in turn are taken to drive changes in societal and organisational power relationships, or second-order change. Drawing from the critical theory of technology's notion that technological progress is not antithetical to emancipatory values, the role of the democratisation of science movements as mechanisms of transparency and accountability is considered. Further paradigms are offered to complement the Burrell and Morgan schema and update it to encompass contemporary ontological and epistemological realities. It is hoped that, under conditions of the digital divide between Global North and South, firms which currently draw profits and resources across this unequal divide might ultimately draw insight from management theory which explicitly incorporates ontological and epistemological principles as well as values premised on critical

theory. Chapter 3 seeks to provide this synthesis and argues for a schema building on Burrell and Morgan's which predicts a positive role for technological advancement and ultimately an emancipatory convergence of values under a more equitable and inclusive paradigm of knowledge creation.

Part 2

Context

Decolonising management studies: A love story

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■ Introduction

The aim of Chapter 4 is to provide an auto-ethnographic account of my work as an academic working in human resources management at the University of KwaZulu-Natal (UKZN), South Africa. It describes and critically reflects my conscientisation in becoming a critical-management scholar within the mainstream school of management studies located in the UKZN college of Law and Management. This personal account is situated within the larger political-economic experience of South African higher education. With Chapter 4, I hope to make two contributions to scholarship in

critical-management studies. Firstly, I provide an account by a South African, who has always lived and worked in South Africa. Most of the empirical and theoretical work in critical-management studies in South Africa is dominated by Nkomo in her sole authored work (1992, 2011) and in her work with others such as Jack *et al.* (2008), Nkomo *et al.* (2009) and Alcadipani (2012) even though she may not always explicitly label it as CMS. In her 2011 article on a postcolonial and anti-colonial reading of 'African' leadership and management in organisation studies, Nkomo acknowledges the difficulties of her own positionality when making interventions about CMS in a South African context. Nkomo's reflection on her own positionality should encourage South African scholars to reflect more deeply on their own positionality as knowledge producers. Nkomo's work demonstrates that a critical scholar is a reflective scholar.

In providing a personal account, I engage in a tenet of CMS known as critical reflexivity. However, I explicate the concept of *vulnerability* as an added dimension in the critical-reflexive process. Along with vulnerability, I invoke the concept of the (sociological) imagination as an important process and outcome of critically self-reflective engagement.

The second contribution is at a more macro level and follows from the first. I argue that South African management studies suffers from a *colonial double bind*. A double bind in this sense refers to a situation where South African management studies is caught between two dominant narratives. The first is the hegemony of Anglo-Saxon knowledge production in the discipline (Gantman, Yousfi & Alcadipani 2015), and the second is a historic Afrikaner-nationalist dominance in the discipline (Ruggunan &

Sooryamoorthy 2014). I contend that South African management studies has to liberate itself from both these binds. In a sense, a double decolonisation has to happen. I argue that as much as this is an act of resistance by those of us working within a CMS paradigm, *it is also an act of love* towards ourselves, our students and the future of the discipline.

■ A note on the methodology

Chapter 4 is the outcome of three phases of research into critical management studies at the University of KwaZulu-Natal (UKZN) that was funded by a teaching-and-learning grant from UKZN. Whilst each phase of the research is a 'stand-alone' project in its own right, Chapter 4 provides a useful platform to reflect on the synergies across these projects in making larger claims about CMS in a South African context. The first phase of the research involves an auto-ethnography of my teaching practice and philosophy as an academic within human resources management as a discipline within a larger school of management studies. This is the reflexive lens through which I then engage in the subsequent phases of the research. Auto-ethnography is a well-established methodology and is increasingly being used by academics as a sense-making exercise in understanding their work as scholars and teachers (Bell & King 2010; Cunliffe & Locke 2016; Dehler 2009; Fenwick 2005; Hooks 2003; King 2015; Learmonth & Humphreys 2012; McWilliam 2008). The second phase of the project took place in 2014 and 2015 and involved an interpretive engagement with students and staff in human-resource management (HRM) in my discipline about how they perceive

and make sense of the intellectual project of HRM as currently offered at UKZN. This occurred through the use of in-depth interviews with eight academic staff in HRM and two focus groups each with second-year and honours students in HRM, respectively. The final phase of research involved a bibliometric (quantitative) and content analysis (qualitative) of the main outlet of human resources scholarship in South Africa, the *South African Journal of Human Resources Management*, from 2003 (the year of its inception) to 2013. Full ethical clearance was obtained from the UKZN ethics committee, and all the principles of informed consent were applied to all participants for all phases of the project. Chapter 4 draws on key elements of the findings from the 'data' to support the larger arguments made in it. A caution to the reader however is that this is not a data-driven chapter but a philosophical, reflexive account of how I view some of the challenges and possibilities for building a CMS in a South African context.

■ Part 1: Racialised epistemologies of management studies in South Africa

Currently, in 2016, South African institutions of higher education are experiencing a wave of student protests nationally (Karodia, Soni & Soni 2016; Ngidi *et al.* 2016; Pillay 2016). These protests began in 2015, culminating in the #FeesMustFall movement which has captured the imagination of South Africans, especially young South Africans (Butler-Adam 2016; Le Grange 2016). In 2016, parts of this social movement led by students are calling for the *decolonisation* of the curriculum at universities. Whilst the meaning of decolonisation

remains nebulous at this stage in the social movement for curriculum change, there are trends identified by students and some academics as to what this process would entail.

Firstly, students claim that higher education and the higher-education curriculum in South Africa is highly racialised (Higgs 2016; Prinsloo 2016). Curricula elevate Anglo-Saxon and Afrikaner knowledge bases at the expense of 'black African' indigenous knowledge. (Luckett 2016). Secondly, this iniquitous state in which some types of knowledge are valued over others contributes to asymmetrical relationships of power between the majority of black students and the majority of white faculty (Molefe 2016).

Provoked by these claims, I engage in a second argument that the decolonisation of management studies in South Africa must not substitute one (colonial) knowledge-production model that legitimates managerial dominance and control for another (indigenous, African nationalist) model of dominance and control. What is needed is to provide an emancipation from colonial and postcolonial accounts of managerialism, even if this means emancipating universities from management studies altogether as suggested by Klikauer (2015). Decolonisation does not mean substituting North-American textbooks with African-authored textbooks that espouse the same managerialist ideology.

Any meaningful discussion about South Africa and critical management studies must take into account the notion of 'race'. Whilst social scientists are keen to eschew race as an essentialist category, race nonetheless has profound material

consequences as epitomised by the apartheid (and post-apartheid) project of racial classification (Durrheim & Dixon 2005; Ruggunan & Mare 2012). I argue that any attempt to 'decolonise' management studies must take into account our racialised past and present.

In apartheid South Africa, universities served as an initial form of racialised social closure into certain professions (Bonnin & Ruggunan 2016). Tertiary institutions were segregated on the basis of race and ethnic group. Of the 21 universities in apartheid South Africa, nine were for Africans (further segregated according to ethnic groups), two catered for coloured and Indian people with the remaining 15 dedicated for white South Africans (but divided between English-language and Afrikaans-language universities). Those allocated to black South Africans often did not offer the tertiary qualifications that would enable a professional qualification. For example, no 'black' universities were allowed to offer the Certificate in the Theory of Accounting (CTA), a qualification required by all those who wished to become chartered accountants (Hammond *et al.* 2012:337), and only the 'whites-only' former technikons offered qualifications in textile design, ensuring that no black textile designers were able to qualify (Bonnin 2013).

There were exceptions; some of which were in the areas of medicine, law, teaching and social work. The apartheid state did not want to play a direct role in the day-to-day or primary welfare of African people (Mamphiswana & Noyoo 2000) and thus allowed black South Africans access to certain types of professions that would allow 'blacks to look after blacks'. Some of these professions included nursing, social work, teaching, law and medicine. This is

in keeping with the apartheid state's ideas of separate development (Bonnin & Ruggunan 2016). Professions outside of the idea of 'social welfare' were not viewed as requiring the participation of black South Africans since these professions were not directly related to issues of social welfare. The state was uncomfortable with the idea of white hands on black bodies or black hands on white bodies in the fields of medicine and nursing, for example. Hence they allowed black South Africans entry into these professions albeit in a controlled and segregated manner (Marks 1994).

It is within this context of racialised and unequal higher education that disciplinary academic and ideological identities developed. I argue that management sciences (note the positivist connotation of the discipline explicit in the word 'sciences') and industrial psychology developed disciplinary identities in the 1960s at Afrikaner universities in South Africa. This was during the zenith of apartheid South Africa. However, in South Africa, the discipline has its roots as far back as 1946 with the establishment of the National Institute for Personnel Research (NIPR) at the Council for Scientific and Industrial Research (CSIR). The NIPR, with its view of racialised and gendered hierarchies of skill (Terre Blanche & Seedat 2001), focused on applied principles of industrial and management sciences. Further, the CSIR was viewed as a pro-apartheid organisation up until 'the transitional period of the 1990s' (Le Roux 2015). Disciplinary knowledge was therefore not immune from the racial capitalism that informed the apartheid project in South Africa. The first fully fledged department of industrial psychology was, for example, located at the University

of South Africa. According to Schreuder (2001), this location had the following consequences:

The Department [*at UNISA*] also acted as a mother figure for the traditional black universities and full-blown departments were eventually introduced at all these universities, as a direct result of Unisa's influence. (p. 3)

It were these Afrikaner centres of epistemological dominance that then paternalistically 'transferred to black universities departments of management and industrial psychology' (Schreuder 2001). Industrial psychology can be viewed as the 'mother' discipline of human resources management in South Africa. The transfer of content knowledge was accompanied by the transfer of disciplinary and ontological knowledge about what the management sciences are. Thus the development of management sciences (to use the positivist terminology) occurred at the intersection of Anglo-Saxon and Afrikaner nationalist epistemologies of what management sciences should entail. The question that needs to be asked is for whom and for what purpose the applied side of industrial psychology, human resources management and management sciences was constructed. It is perhaps not surprising that the first doctorate awarded in industrial psychology in South Africa in 1957 was a for a thesis entitled *Die opleiding van Kleurlingtoesighouers in 'n klerefabriek'* [The training of Coloured supervisors in a clothing factory]. I contend that the Afrikaner nationalist obsession with racial categorisation and eugenics (Dubow 1989; Singh 2008) found a natural home in South African management sciences. Black bodies were to be controlled, disciplined and punished. There was something innate about the black body that rendered it cognitively and physically different and thus not suited for all types of work and labour.

A racialised form of Taylorism was at the crux of the apartheid labour project, and management sciences provided a 'scientific rationale' for this project. A democratic and inclusive management studies was not possible in an undemocratic state. As Sanders (2002) shows in his work, during the apartheid era intellectuals and academics, especially those at Afrikaner or previously 'white' universities, were complicit (even in their silence) in the apartheid project (see Le Roux 2015 for the tension between the complicity and resistance of academics at South African Universities during apartheid).

There is a dearth of publications on the history of management studies in South Africa. However, there are two key publications that are revealing in their omissions. The first on the history of industrial psychology in South Africa by Schreuder (2001) and the second by Van Rensburg, Basson and Carrim (2011a, 2011b) examine the history of the development of human resources management as an applied profession. Both pieces do not speak to apartheid. In fact, the word apartheid is not mentioned once in either article. Race, power relations and the politics and purposes of knowledge production are rendered invisible. Descriptive accounts are provided with no reflexivity as to the intellectual projects of management studies under apartheid South Africa. Management sciences and HRM values and content are thus presented as universal. A first intervention in the decolonisation of management studies therefore must be to provide a critical and reflexive historiography of the disciplines in the form of publications. This will allow us to engage in processes of 'denaturalisation', there by rendering the familiar narrative of

South African management studies 'strange', provocative and disruptive (Fournier & Grey 2000; Prasad & Mills 2010).

Concomitant with the dominant Afrikaner and Anglo Saxon project of management studies to control, discipline and increase *performativity* towards profit is the emphasis on the scientific method and the positivist approach (Mingers & Willmot 2013; Wickert & Schaefer 2015). I contend that the daily administration of the apartheid state project, like that of Nazi Germany or America during the height of slave ownership (Cooke 2003; Johnston 2013; Stokes & Gabriel 2010; Rosenthal 2013), was a profoundly bureaucratic and scientific management practice. The preoccupation of the apartheid state with 'scientific' racial classification, the administration of apartheid legislation and even the 'pencil test' (used to assess how straight someone's hair is, and based on straightness of hair, a racial classification was made) as a scientific means of determining one's 'race' would have resonated with the positivist philosophy of management studies at the height of apartheid (Posel 2001). Scientific evidence could be collected to demonstrate why labour markets needed to be racially segregated and as a way to manage the moral panic of racial integration.

This fetishisation of positivism continues in most South African schools of management. For example, theses by Bruce (2009); Kazi (2010) and Pittam (2010) are the only attempts to provide a critical discourse analysis of South Africa journals that focus on human resources management. Both Bruce and Pittam report that, from their content analysis of key South African journals in management studies, managerial discourses (as opposed to critical-managerial or anti-managerial discourses) persist. Both conclude that these journals

overwhelmingly reflect a managerial bias, even when considering topics that are ‘softer’ or more focussed on human relations such as work-life balance. Their work provides a revelatory account of the mainstream agenda of South African management studies.

■ Institutional affiliation and knowledge production in management studies in South Africa

In an attempt to extend on the work of Bruce (2009), Kazi (2010) and Pittam (2010), Ruggunan and Sooryamoorthy (2014) provide a quantitative bibliometric analysis of the most important South African outlet for South African research in human resources management, the *South African Journal of Human Resources Management* (SAJHRM). In their review of a decade of research published in this journal (from 2003 to 2013), they made the following findings. Of a total of 259 papers published, more than 86% of articles published in the journal were authored by white South Africans (as first authors). Most of these authors work or worked at former Afrikaner universities with the majority of authors affiliated with the former Rand Afrikaans University (RAU) and the University of Johannesburg (UJ). RAU merged in 2005 with the Witwatersrand Technikon and the Soweto and East Rand campuses of Vista University to become the University of Johannesburg. The table below demonstrates the main institutional knowledge producers of empirical work in the SAJHRM.

The top four producers of papers in the *South African Journal of Human Resources Management* are from the former Afrikaner Universities. This is not surprising, given the epistemological genesis of the discipline in South Africa. The racial and gender demographics

TABLE 2: Institutional affiliation of South African authors.

Institution	2003–2008		2009–2013		All	
	No.	%	No.	%	No.	%
University of Johannesburg	96	56.1	75	43.9	171	100
Rand Afrikaans University	108	100	0	0.0	108	100
University of South Africa (UNISA)	21	32.7	44	67.3	65	100
North-West University	7	13.0	47	87.0	54	100
University of Cape Town	2	0.09	20	90.9	22	100
Nelson Mandela Metropolitan University	5	27.7	15	83.3	18	100
Stellenbosch University	2	18.2	9	81.8	11	100
University of Witwatersrand	0	0.0	8	100.0	8	100
University of Fort Hare	0	0.0	3	100.0	3	100
University of KwaZulu-Natal	0	0.0	3	100.0	3	100
University of Free State	1	33.3	2	77.7	3	100
University of Zululand	2	100.0	0	100.0	2	100
University of Limpopo	1	100.0	0	100.0	1	100

of authors are shifting across the South African higher-education landscape due to active state intervention. For example, women as first authors outnumber men in the SAJHRM. Black (African, Indian and coloured) authors are still in the minority, but there is an upward trend in the number of contributions from these ‘groups’. This however does not reflect a shift in *the type of knowledge* being produced in management studies.

Three cautions

This section renders three cautions about why a demographic shift in the people who produce knowledge does not equate to a profound shift in the content of the knowledge produced. The first caution is that a racial and gendered democratisation of the discipline in terms of who is publishing does equate to an epistemological decolonisation of the discipline. It may instead become a neo-colonial project to further legitimise the

managerialist discourse of the discipline. In the current context of racial and curricula transformation in higher education, decolonisation often serves as a shorthand for increasing the racial diversity of South African faculty. Whilst this in itself is a non-negotiable and laudable goal, it is not tantamount to decolonising the curriculum of management studies or any other discipline. A second caution is the tendency to equivocate research and textbooks by South African, African (from the continent) or Global South (nationality of authors) authors as innately postcolonial, decolonial or critical. From my own experience as a HRM academic, I have noted that the authors of South African HRM texts are more diverse in terms of race and gender, which is encouraging. However, the texts still reflect mainstream Anglo-Saxon management epistemologies accompanied by local case studies to make the texts 'relevant' for local students. This is far from a decolonial project. Rather, it seems like a neo-colonial project perpetuating dominant managerialist discourses. A third caution centres around the issue of appropriating African concepts such as *ubuntu* (Govender & Ruggunan 2013) and marketing these concepts as forms of indigenous African philosophies that are relevant to management studies. This is mainly advocated by management consultants and has resulted in a plethora of popular management books on *ubuntu*, for example Jackson (2013) and Nkomo (2011). As Mare (2001) argues, it is self-serving to appropriate African philosophies to prop up dominant managerial discourses. The South African scholarly literature on HRM remains silent on this sleight of hand by management practitioners. Critique has come from South African

industrial sociology instead and from some international scholars. I would argue that South African HRM is therefore complicit in this appropriation to further its own managerial project.

HRM practitioners and consultants use *ubuntu* as a tool for 'diversity management', transformational leadership and conflict management, amongst other types of HR practice. Whilst not discounting the need and usefulness of indigenous philosophies in academia (in fact, this is an essential part of the decolonisation process), it is vital that we as CMS scholars ask for whom and for what purposes these indigenous knowledge systems are being applied (Banerjee & Linstead 2004; Hountondji 2002; Jack *et al.* 2011; Westwood & Jack 2007). These three cautions need to be framed within a larger debate on identity politics and 'who can speak for whom.' As Nkomo (2011) eloquently argues in her piece on the postcolonial condition in African management studies, positionality is important.

■ Epistemic violence against the other

The core curriculum of management studies in South Africa perpetuates a form of epistemic violence (Spivak 1988) regardless of the race and gender of knowledge producers. For Spivak, epistemic violence refers to the violence of knowledge production. Teo (2010) contends that, for epistemic violence to operate, it has to have the following:

[A] subject, an object, and an action, even if the violence is indirect and nonphysical: the subject of violence is the researcher, the object is the Other, and the action is the interpretation of data that is presented as knowledge. (p. 259)

I argue that, in the case of management studies, the epistemological violence refers to the interpretation of social-scientific data concerning the Other (Spivak 1988; Teo 2010). The Other in this case refers to employees and is produced under the following conditions (Teo 2010):

[*When*] empirical data are interpreted as showing the inferiority of or problematizes the Other, even when data allow for equally viable alternative interpretations. Interpretations of inferiority [*or problematizations*] are understood as actions that have a negative impact on the Other. Because the interpretations of data emerge from an academic context and thus are presented as knowledge, they are defined as epistemologically violent actions. (p. 295)

I argue that critical management studies needs through its three tenets of reflexivity, denaturalisation and critical performativity to render visible these acts of epistemic violence. Sceptics like (Klikauer 2015) remain unconvinced that CMS can actually create the conditions to transcend epistemic violence once it has identified instances of such violence. Given the persistence of the racial division of labour and racial hierarchies in the South African labour market (Commission for Employment Equity Report 2015), I posit that the practice of managerialism as informed by dominant managerialist discourse in South Africa has been unable or unwilling to shift in any significant manner the racial demographics of the labour market in the private sector. Whilst global racism is not new or unique, it does assume a specific form in the South African context. A Fordist system of racialised capitalism in the form of apartheid still resonates 25 years after the official dismantling of apartheid and 300 years after the start of British, German, Portuguese and Dutch colonial projects in Southern Africa. In HRM, ‘diversity’ serves as a proxy for ‘race’

and is something to be managed and controlled lest it creates panic amongst private-sector capital. The recent cases of Marikana and the class-action suits brought against mining capital by South African miners demonstrate the expendability of black bodies to capital (Alexander 2012). Banerjee's (2011:1541) work shows how the political, social and economic conditions that enable the extraction of natural and mineral resources from indigenous and rural communities in the Global South lead to 'dispossession and death'. This has certainly been the South African experience regarding mining capital and its managerial style despite the existence of corporate programmes for social responsibility at all the major mining houses based in South Africa. Forms of epistemic violence transform into actual physical violence against expendable black bodies as witnessed in Marikana.

The content analysis of the *South African Journal of Human Resources Management* from 2003 to 2013 demonstrates empirically the ways in which discourses developed about the *expert and the other* (Ruggunan & Sooryamoorthy 2014). The HRM researcher is the subject of the epistemic violence which is directed at the worker who is the Other. For example, the key themes that were discovered after an iterative data-reduction process are as follows:

□ **Theme 1: Human resources management exists for managers**

Managers are constructed as rational, expert and logical beings that make decisions based on positivist 'scientific research' created by HRM researchers in the academy. This also does a disservice

to managers. The contributions to this journal implicitly situate the manager as all-rational, therefore denying managers the fallibilities of being human. As the literature demonstrates (Dent & Whitehead 2013; Sveningsson & Alvesson 2003), managers struggle with their own nuanced identities and what it means to be a manager.

Theme 2: Employees are therefore viewed as irrational, with little to no agency

They need to be managed to have their potential realised for more efficient profit-driven production. Asymmetrical power relations are not fully voiced. Bruce and Nyland (2011) provide a historiographic account of how managerial identity becomes constructed as rational and worker identity as irrational. This theme therefore supports their arguments.

Theme 3: Race, gender and sexuality are viewed as instrumentalist, essentialist demographic categories that are included as nominal variables on a Likert scale

There is no attempt in any of the articles to deconstruct or provide a critique of racial classification systems. These categories are seen as a natural order. Scholars write about topics such as employment equity, diversity in the workplace and affirmative action without a reflexive or critical voice. This leads to studies that exclusively focus on how management can use these racialised and sexualised bodies to increase performativity and organisational efficiencies.

Theme 4: Workers possess infinite human resourcefulness

This theme was discovered mainly from articles published in the journal from 2009 to 2013. It refers to work on performance management, work flexibility, talent management, upskilling, reskilling and improvements that workers have to make to themselves to ensure their employment in increasingly insecure labour markets. HR scholars believe that workers (as human beings) present an infinite and innate ability to constantly adapt to new labour-market conditions. Work by Costea, Crump and Amiridis (2007) introduces the concept of infinite human resourcefulness and how it has insinuated itself into HRM practice and discourse. HRM and managerialism construct the self as a work that is infinitely in progress, always being retooled to achieve more but never quite achieving it. This seems to be the philosophy informing most performance-management systems, for example.

Theme 5: The for-profit organisation is a norm

Whilst some articles focus on human resource issues in the public sector, the majority of articles focuses on the private-sector organisation. The organisation is presented as normative rather than a contested site of struggle.

Theme 6: Positivism is the dominant methodological philosophy employed by scholars publishing in this journal

The inheritance from industrial psychology is clearly seen here. There is an overwhelming use of standardised psychometric instruments that are applied to different populations in different

work contexts. The work tends to be more theory validating than theory generating. Positivism is rendered normative.

□ **Theme 7: Human relations are pro-worker**

Many topics such as work-life balance, diversity in the workplace, spirituality in the workplace and transformational leadership, for example, initially appear as pro-worker but inevitably end up being calls to action to increase performative efficiencies in the workplace. 'It's all about the bottom line.'

The themes articulated above echo those found in similar studies in the Global North (Dehler & Welsh 2016; Fournier & Grey 2000; Spicer *et al.* 2009; Willmott 1992). This demonstrates the universality of the intellectual project of mainstream management studies. I was curious as to how the themes identified through a critical content analysis of the main outlet of HRM scholarship in South Africa may also speak to (if at all) perceptions held by HRM students and HRM permanent lecturing staff of HRM as a discipline and an intellectual project, hence the second phase of the project. In other words, do HRM scholars and professors transmit a specific set of managerialist values to students? If they do, can these value agents also change the nature of the values transmitted? The second half of Chapter 4 aims to speak to these questions.

■ **Part two: The year of living dangerously**

In our 2014 article, 'Critical pedagogy for social change' (Ruggunan & Spiller 2014), I reflect on my journey from being an academic in a department of industrial psychology to being an academic in a department of human resources, albeit at the same university.

I moved across disciplines in 2011 because funding decisions regarding my university's College of Humanities (where industrial sociology was located) left the College with limited resources. At the end of 2010, I was one of two permanent staff members in the programme for industrial sociology. This became an untenable position to work in, given that the Department originally consisted of seven permanent staff members. A post had opened up in the discipline of human resources management in the College of Law and Management on another campus of my University, and I decided to apply for it. At the time, I never considered myself a serious candidate, given the vastly different epistemic approaches between industrial sociology and management studies in South Africa. I remember thinking, 'Why would a management school hire an industrial sociologist, especially one whose work has been pro labour and implicitly anti-managerialist?'

I was therefore surprised to be shortlisted and subsequently appointed as a senior lecturer in the discipline of human resources management in the College of Law and Management Studies in 2011. The cross-pollination of social scientists from colleges of social sciences and colleges of humanities with those from business or commerce schools in the United Kingdom has been documented by critical management scholars like Grey and Wilmott (2005). As South Africa emulates the same form of new managerialism at our universities, it seems that many social-science academics have to find new disciplinary homes, many of which will be in business schools. Houghton and Bass (2012) are one of the first publications about this phenomenon that is gathering pace in the South African context.

Their article, 'Routes through the academy: Critical reflections on the experiences of young geographers in South Africa', further captures my frustrations about the commodification of South African education along a Thatcherite path. The article points out how South African academics, from sociologists to geographers, have to retool and explore new disciplinary paths and career routes in the academy. These are important interventions in understanding the politics and practices of knowledge production beyond the Anglo-American core (Hammet & Hoogendoorn 2012).

However, I would argue that it may also represent a moment of opportunity and resistance for those of us who are advocates and practitioners of a critical management studies in South Africa. It provides an opportunity to spread ideas into knowledge-production spaces to which we may not have had access otherwise. It is also a double act of emancipation and resistance to stay within the academy as CMS advocate (albeit in a different disciplinary home) rather than leave the academy altogether. If an unintended (some would say intentional) consequence of the neoliberal commodification of universities globally is the erosion of critique from public intellectuals in the social sciences and the humanities by making work in these areas insecure, that critique can reform and be articulated from new disciplinary spaces such as schools of management studies. It also opens up a space for broader reflexive debates on the intellectual project of specific disciplines, whether these be geography, accounting, management studies or medicine.

I found my new disciplinary home better resourced and better staffed. This increased the time available to me to more deeply reflect

on my new role as a HRM academic. Was I to be, as Klikauer (2015) contends, an accomplice to neo-liberal capitalism or was there space for me to become an agent of change through reflecting on the values underlying society? This dissonance generated much discomfort and introspection in me during 2011. It produced a state of what I term *vulnerability*. I contend that vulnerability is part of the critical self-reflexive process of CMS. As the literature indicates, the flipside of vulnerability is creativity (Akinola & Mendes 2008; Brown 2012a, 2012b). Vulnerability produces a disruption, a destabilisation of existing pedagogical and disciplinary knowledge. I was deeply aware, as Nkomo (2011) observes in her account of moving from the USA to a South African department of human resources, that the Anglo-American epistemological paradigm was dominant. This was reflected in the types of textbook prescribed to students and the types of topic explored in various modules. Where South African texts were used, they reflected the main centres of HR knowledge production, that is, the formerly Afrikaner universities. However, apart from the affiliation of authors of textbooks, the narrative of the discipline of HRM was a predominantly managerialist and positivist one. We were, as averred to earlier in Chapter 4, caught in a double colonial bind, an Anglo-Saxon-Afrikaner nationalist nexus.

The geography of the UKZN as a multiple-campus institution means that HRM students cannot easily choose electives or majors in philosophy, sociology, psychology or other modules outside of the College at which they were enrolled. Apart from curricular restrictions, they would have to travel 11 kilometres to a separate campus to attend lectures there and then travel back to their

home campuses. The multi-campus model means that certain colleges have specific geographic homes. Thus commerce studies are situated at Westville Campus and social-science and humanities studies are situated at the Howard College Campus in Glenwood. One impact of this is that curriculum development happens in isolation, and there is very little opportunity for interdisciplinary work across colleges. I therefore arrived to very insular curricula being offered in the curriculum for human resources management. This contributed to my vulnerability as I felt that I had to retool extensively and 'forget' my industrial-sociology training. Whilst there were synergies between industrial sociology and human resources management, the former was very labourist and the latter very managerialist. This dissonance and vulnerability allowed me to discover the CMS literature and embark on a historiography of HRM (still a work in progress) in South Africa. It was an empowering experience that led me to examine the content, message and values of the HRM modules I was teaching. I was also wary of one of the pitfalls of CMS practitioners as articulated by Grey *et al.* (2016), namely that one can be condescending of the voices and practices of other academics in the discipline. Vulnerability also means letting go of 'the ego of expertise'. It involves a questioning of one's role as the expert (even when that expertise is a CMS expertise!). The year 2011 was therefore one of relocation, dislocation, vulnerability (and its flip side, creativity) and conscientisation. It was at the end of academic year in 2011 that I thought it prudent to hear from other voices within the HR academy and student body at UKZN and began writing a proposal to fund a project on critical management studies. I found the

university teaching and learning office (UTLO) and my colleagues within my HRM discipline very supportive of my proposal. Perhaps this is an anomalous experience, but I found a cohort of colleagues who were supportive, and my proposal was funded for a period of two years. This once again speaks of the ability to craft critical spaces in neoliberal or managerialist universities (as is the identity of most universities globally and in South Africa). The support could further be explained by a UTLO cohort of staff that are sympathetic ideologically to critical theory and its application to management studies. The support offered to CMS scholars may differ greatly, depending on the organisational culture of the university in which he or she practises. Thus, my experience may not be one that is enjoyed nationally. However, as this book project demonstrates, such support is gaining momentum.

■ Towards a management studies for publics

Almost a year after my move to my new home in management studies, an event occurred in South Africa that reverberated globally: the massacre of miners at Marikana in September 2012. It continues to receive extensive analysis globally and nationally. What intrigued me and further propelled me to push for a CMS agenda in HRM was the silence from management-studies academics about the egregious act of violence against workers. The ways in which the ‘Marikana Massacre’, as it became known, was integrated into my teaching practice was written up in a 2014 article by myself and Dorothy Spiller. The point I want to reiterate for Chapter 4 however, is the lack of any public-intellectual critique of the mining houses and their management by management-

studies intellectuals in South Africa. The silence was overwhelming. Comment and opinion from the academy emanated from development-studies, sociology and political-science scholars, and to a limited degree, economists. Given that what happened at Marikana was an outcome of pathological managerial practices of mining capital, the lack of a more public discourse initiated by management-studies scholars was revealing.

In his presidential address to the American Sociological Association in 2004, Michael Burawoy spoke about a *public sociology*. This refers to a style of sociology done for the greater public good as opposed to a private sociology which is done for professional and career mobility and usually speaks to the academy only. It is worth reiterating Buroway's (2005) argument verbatim:

Responding to the growing gap between the sociological ethos and the world we study, the challenge of public sociology is to engage multiple publics in multiple ways. These public sociologies should not be left out in the cold, but brought into the framework of our discipline. In this way we make public sociology a visible and legitimate enterprise, and, thereby, invigorate the discipline as a whole. Accordingly, if we map out the division of sociological labor, we discover antagonistic interdependence among four types of knowledge: professional, critical, policy, and public. In the best of all worlds the flourishing of each type of sociology is a condition for the flourishing of all, but they can just as easily assume pathological forms or become victims of exclusion and subordination. This field of power beckons us to explore the relations among the four types of sociology as they vary historically and nationally, and as they provide the template for divergent individual careers. Finally, comparing disciplines points to the umbilical chord that connects sociology to the world of publics, underlining sociology's particular investment in the defense of civil society, itself beleaguered by the encroachment of markets and states. (p. 20)

It may be useful for management, and indeed *critical management studies*, to draw on Burawoy's idea of public sociology. A critical-management studies that only offers critique is a legitimate form of intellectual endeavour in and of itself. However, in addition to this, we need a management studies for publics. I use the plural of public since the public that we should serve is composed of diverse sets of people and is heterogeneous. A management studies for different publics should speak not only to managers and for managers, but it also needs to speak about managers, about workers and about political economy. This type of critical-management studies and a management studies for the public were missing during the debates about Marikana. When management-studies academics speak publically in South Africa, it is usually about ways to increase managerial effectiveness in order to allow workers to be managed better in order to increase efficiencies or it is to provide critiques of union or labourist activities.

South Africa provides the perfect context politically, socially and economically for this experiment in management studies. Some critics like Klikhauer (2015) would argue that an activist management studies is a contradiction in terms, and management studies can only exist for a managerial class. Arguably, management studies should not even be a legitimate part of universities if it serves a managerial class only, particularly in the contexts of a developing state. If it is unable to generate its own form of critical-management studies and a management studies for publics, then it is merely a professional management studies that will continue to be exclusionary, undemocratic and a platform for epistemic violence.

■ Management lecturers' identities at work

Related to the issue of management studies for publics is the need to understand the ways in which lecturers construct their identities as management-studies academics. Work by Moosmayer (2012) and Huault and Perret (2016) suggests that management-studies academics are powerful transmitters of values to their students, even when those values may be the values of disciplinary knowledge rather than personal value systems. This often creates tension in the ways in which lecturers construct and perceive their identities. Three central themes on issues of identity were discovered from in-depth interviews with eight HRM lecturers at UKZN:

■ Theme 1: Knowledge is neutral

This is epitomised by quotes such as the following:

'[W]ell it is about the scientific method and what that determines. Business needs facts to make evidence based decisions ... so the scientific method is objective. I just present the findings to class.' (P1)

'I don't think science can have an agenda or value system, it simply presents a finding, whether you agree with that finding or not is another matter. There is no room for emotion ... so you will see that how and what I teach is common across similar modules in the country.' (P3)

■ Theme 2: Separation between personal and discipline knowledge value systems

Quotes from two participants suffice to illustrate this theme.

'I know that, for business, it is all about the bottom line, and much of our work that calls for greater employee empowerment gets ignored ... This does

upset me because as a private person I see every day how corporatisation is destroying the world around us, but at the end of the day as I said, it's about the bottom line in the real world, and I would not want my students unprepared for that world.' (P4)

'I feel that I have to present a very professional class since I am teaching about the corporate world. I guess if I was in the Arts or such it may be different but my spiritual and personal life is not for my students' consumption. I sometimes offer opinions about [*corporate*] scandals, but students pay a lot of money for their [*business*] degrees so I have to deliver.' (P5)

[*When probed further on this, the participant said*] 'I mean my spiritual beliefs, don't always support the scientific method for example ... [*laughs*], but it's not relevant at the end of the day.' (P5)

'We do an ethics module at second year, so I'm sure values are part of that syllabus. We have to teach for the real world. We will also be designing a first-year module based on the principles of responsible management education, so I think that may bring values into the picture.' (P6)

Theme 3: Values as concern for 'other disciplines'

'[O]ur mandate is quite clear, we have to service the private sector. Yes, I think students can benefit from modules that teach values in philosophy or sociology, but for us, we do cover sustainable development and such but every module can't be an ethics or values module. I think these things can be better taught in social-science modules. That doesn't mean I don't have certain moral values, but students don't want to sit and listen to my stories.' (P2)

'I do often think about the issues of values, and I try to highlight the human-relations aspect in my teaching. However, most of our students I think end up in highly administrative jobs so I am not convinced that they actually get to make a difference. They end up as cogs ... perhaps we do need to discuss this as a discipline ...' (P7)

There are three points of reflection on the above themes. Firstly, all participants interviewed expressed both semantically and latently the belief that knowledge production, which they articulated as ‘the scientific method’ which itself is a shorthand for positivism, is neutral and objective. There is also a strong sense of a professional identity based on ‘scientific’ principles and objectives. As argued by Ruggunan and Spiller (2014) and Moosmayer (2012), the positioning of positivist values as universal and neutral has been mainstreamed into management studies as a discipline. This concurs with Ruggunan and Spiller’s (2014) argument that the values of positivist approaches to social sciences should be made explicit. They contend that the positivist approach constructs the academic as a ‘value-free agent’ in the classroom. Moosmayer (2012:9) refers to this as the ‘paradox of value-free science and the need for value-orientated management studies.’

How then can a management-studies academic disrupt this notion of a value-free or economic rationalist approach to HRM? Ruggunan and Spiller (2014) posed this question in 2014 in their speculative piece on critical management studies for social change in South Africa. Since then, there has been a colloquium on critical management studies organised at the University of Johannesburg in 2015 and an Academic Monitoring and Support Colloquium at the UKZN where critical management studies was the theme of the keynote address given by myself. Both these events attempted to answer the above question by suggesting that

critical self-reflexivity is required by management-studies academics if we are to give voice to values.

As we argued in our 2014 paper (Ruggunan & Spiller 2014), we support calls by Moosmayer (2012) and Lukea-Bhiwajee (2010) towards the following:

[T]o encourage greater introspection about the nature and purpose of the discipline amongst academics. This may encourage a shift towards a more social and critical perspective in the ways in which the discipline is taught and the research is generated ... Academics need to be value agents and being scientific does not imply being value free. (p. 230)

Secondly, management academics also experience a form of cognitive or emotional dissonance. This tension is most evident due to the separation of 'discipline value systems' and 'personal value systems'. Personal values also do not always have to be 'positive'. They can be negative, for example, sexist or racist or pro exploitation. Advocates of critical management studies therefore have to be careful when discussing values and value systems. Participants all said that these have to be separated. It may be hyperbolic to argue that management-studies academics are 'handmaidens of capitalism', but the interviews do reveal a cognitive and emotional dissonance between the personal and public identity of academics. The emotional labour literature (Ashforth & Humphrey 1993; O'Brien & Lineham 2016) uses concepts such as deep acting and surface acting to describe the difference between authentic and superficial displays of emotion during the labour process. The eight academics interviewed all spoke about their work in the class room as a form of 'performance', as a way of enacting the behaviour expected of a rational-scientific lecturer in the management sciences. More empirical work

needs to be done to assess the extent to which deep and surface-acting behaviour influence this performativity of identity. Whilst emotional labour¹⁶ amongst teachers and academics abounds in the literature, more focused work is needed on management-studies lecturers.

Thirdly, the theme that I labelled ‘values as the concern for other disciplines’ is really a failure of imagination within management studies generally and in a South African context. This failure of imagination has been captured by Alvesson and Sandberg (2013) in the global literature on critical-management studies and the mainstream literature on management studies. The South African literature is less robust on the need for a (re-imagined) South African management studies that espouses the principles of critical-management studies.

I argue that what is needed is a series of imaginations in management studies. These involve three imaginations. The first of these is an imagination for what a management studies for publics may look like. The second is an imagination for a new research agenda beyond ‘gap-spotting’, and the third is a pedagogical imagination beyond managerial ethics as well as principles of responsible management education (PRME). These three imaginations, I argue, can be catalysed by a sociological imagination (see Alvesson & Sandberg 2013; Chiapello & Fairclough 2002; Watson 2010). The idea of the sociological imagination is associated with C.W. Mills’ ground-breaking 1970 book, called *The sociological imagination*. It could also be referred to as a social-scientific

16. By emotional labour, I refer to the ways in which our jobs and occupations require us to regulate our emotions, feelings and expressions in order to achieve the outcomes of our work.

imagination. Mills argues that such an imagination calls for the following (Watson 2010):

[L]inks to be made between *personal troubles of individuals* (a person losing his or her job for example) and broader *public issues* (the issue of unemployment in society for example). (p. 918)

This link between the personal (micro) and the public (macro) or political economy provides for a more analytical and critical management studies than we have in South Africa at present. This does mean that scholars need to engage in deep contextual work and a constant questioning of what is seen as normative in management studies. Management studies needs to exercise this sociological imagination for the public good (not corporate interests, private business or managerial good only). Social science is by nature a critical undertaking, and HRM in South Africa especially needs to identify itself as a social science rather than a business science – or any imitation of the natural sciences as I argue it currently does. This allows us to view management studies as ‘a set of practices, embedded in a global economic, political and socio-cultural context’ (Janssens & Steyaert 2009:146).

Given the intrinsic critical nature of social science, the ‘critical’ in critical-management studies is actually unnecessary. In ‘doing’ management studies for the public(s), we need to bring together those management-study academics who see their role as increasing the performativity of employees for corporate efficiency and those who argue for an anti-performativity management studies. If we are to do good social science, all management-studies academics need reflexivity, including those who identify themselves as critical.

A management studies for publics, therefore, must be inclusive, and it requires imagining management studies as a social science (not a 'hard' or 'positivist' science). Discussion groups, colloquia (such as the one held at the University of Johannesburg in 2015), journals, business schools, organised labour and a range of other stakeholders need to engage in robust debate about who the publics are for management studies and what its intellectual project entails.

An outcome of the above is asking the following question: 'For whom do we do research and for what purpose?' Is it only to increase organisational and performance efficiencies? Is it to increase the career mobility (professional-management studies) of academics? Or is it as Alvesson and Sandberg (2013) contend only to fill incremental gaps in the literature? We perhaps research for all these reasons, but if we are to 'decolonise' management studies from its mainstream incarnation, we have to acknowledge that, despite a massive increase in the number of management-studies articles published globally in the last three years (Alvesson & Sandberg 2013:128), there 'is a serious shortage of high-impact' or ground-breaking research in management studies. Alvesson and Sandberg (2013) offer an analysis of why management-studies research has become so 'unimaginative', and I do not want to rehearse their arguments for Chapter 4. They also suggest strategies to shift from unimaginative, 'gap-spotting' research to ground-breaking research. Their work is important because it speaks to my second call to reimagine the research agenda for South African management studies. One way of doing this is by asking the difficult questions posed above. These questions are

related to problematising our identity as management-studies academics, and it is through doing this 'identity work' that we can reimagine our research agendas, especially in the unique political economy that is South Africa.

The third imagination, the pedagogical imagining, involves a reconfiguring of how we do management studies in the classroom. As I argue in a 2014 article, this involves doing management studies (in the classroom) for social change. We need to engage with Spivak's concept of epistemic violence, the postcolonial and anti-colonial philosophical literature (Ahluwalia 2001; Appiah 1993; Bhabha 1994; Fanon 1967) and Freirean pedagogy. What do we hope to achieve in management studies education, and for whom do we hope to achieve it?

■ Conclusion

I hope that this edited collection and Chapter 4 will stir debate about the shape and purpose of a critical-management studies project in South Africa. Chapter 4 has been an exploratory reflexive 'think piece' that suggests three ways forward in decolonising management studies and advocating for a critical-management studies project. The first is to engage in critical historiographies of South African management studies and its allied disciplines. Such exercises unpack the ways in which disciplinary knowledge is produced over time and challenge the view that management-studies knowledge is universal and apolitical. The second is to engage in a management studies for publics, as opposed to a management studies for professional

mobility or a management studies for a managerialist public only. This helps democratise the curriculum and research agendas and encourage more critical public-intellectual activities from within the field. The third point is that management-studies academics need to re-imagine the discipline through the lens of a sociological or social-science imagination which is inherently a critical and reflexive imagination. These three strategies for change will influence pedagogy, research and practice. To advocate for these changes is, as mentioned in my introduction, an act of resistance, an act of emancipation and ultimately an act of love.

■ Chapter 4: Summary

Chapter 4 offers an auto-ethnographic account of my work as a lecturer in human resources management during a pivotal moment in South African higher education. Chapter 4 posits that any engagement in a critical-management studies project in South Africa needs to acknowledge the politics of knowledge production. Chapter 4 suggests three ways forward for a CMS project. The first is to engage in critical historiographies of South African management studies and its allied disciplines. Such exercises unpack the ways in which disciplinary knowledge is produced over time and challenge the view of management-studies knowledge as universal and apolitical. The second is to engage in a management studies for publics, as opposed to a management studies for professional mobility or a management studies for a managerialist public only. This helps democratise the curriculum and research agendas and encourages

more critical public-intellectual activities from within the field. Thirdly, management-studies academics need to re-imagine the discipline through the lens of a sociological or social-science imagination which is inherently a critical and reflexive imagination. These three strategies for change will influence pedagogy, research and practice. To advocate for these changes is an act of resistance, emancipation and love.

Feminism in management research: A route to justly optimise talent

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‘Convictions are more dangerous foes to truth than lies.’ - Nietzsche

■ Introduction

The words ‘feminist’ and ‘feminism’ are controversial, arousing visceral responses from many people (Offen 1988). These responses include some from within the academic fraternity where bell hooks

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(2000) has noted that second-hand accounts and misinterpretations contribute to the inaccuracy and fear associated with feminism. This situation is fuelled by the fact that feminism defies easy definition because it is under continual dispute and negotiation with researchers adopting a range of approaches to its definition and description (bell hooks 2000; Griffin 2015; Hekman 2015; Hesse-Biber 2012; Letherby 2003; Lorber n.d.; Thomas & Davies 2005), hence feminists should be open to critical scrutiny by others (Hesse-Biber 2012; Letherby 2003). In brief, feminism concerns itself with the identity of women, both philosophically and socially (Hekman 2015; Letherby 2003), and with equal rights (bell hooks 2000), politically, legally and economically (Lorber n.d. Offen 1988); not only for women but for all minority and marginalised groups (see Lorber n.d.). Identity encompasses an understanding of empowerment at a personal level, having a voice, knowing how they (women and marginalised groups) are different, knowing what cultural and social expectations they carry, and how they carry them, in both a personal and professional way (see Calvert & Ramsey 1992), which inevitably challenges knowledge claims (see bell hooks 2000; Calvert & Ramsey 1992; Hesse-Biber 2012; Letherby 2003; Thomas & Davies 2005). Equal rights aim to end sexism, sexist exploitation, oppression, domination, racism, class elitism, imperialism and patriarchy (bell hooks 2000). Without a clear sense of identity, women cannot fruitfully participate in discourses on equality, which aims at changing women's and minority or marginalised groups' lives for the better by ensuring inclusiveness. In essence, feminists seek to challenge the existing social systems that they regard as responsible for the oppression and

exploitation of women and other marginalised groups. Fundamentally, feminism concerns itself with autonomy, which refers to that which allows all persons regardless of gender, class, race, religion and sexual orientation to become fully self-actualised beings and to create a cherished community in which they can live together, realising their dreams, especially those of freedom and justice, giving effect to the truth that all humans were created equal (bell hooks 2000; Hekman 2015). At the same time, bell hooks (2000) points out that equality does not mean equity and thus acknowledges differences between people, whether from the same gender, sexual orientation, social class, race and religion, which differences feminism embraces.

Freedom is the source from which all meaning and value springs (Hekman 2015; Offen 1988). Consequently, all human beings are placed on a moral plane, seeking freedom to will the self as well as others towards it (Hekman 2015). Freedom and feminism are social constructions, which are subjective in nature and depend on context for their meaning, as well as relationships with others (Calvert & Ramsey 1992; Hekman 2015; Hesse-Biber 2012; Letberby 2003). A lack of an understanding of freedom results in people, especially women to consent to servitude, perpetuating inequality (bell hooks 2000; Hekman 2015). Ignorance leads inter alia to flawed scholarship, which further exacerbates, or worse, creates hierarchies of inequality in labour, class, gender, sexual orientation (Griffen 2015) as well as race, disability and children's rights. In the labour market, findings show that women are underpaid or unduly overlooked for promotion. This undermines moral justice, and many countries regard such practices as unlawful (Gregory-Smith, Main & O'Reilly III 2013).

Furthermore, discrimination in the labour market perpetuates economic inefficiency (Becker 1957). In contemporary times, particularly in South Africa, equality, freedom and social justice have been receiving increased attention so as to prevent the continuation of the injustices of the past. In addition, globally, organisations are on a quest to manage talent by including minorities and marginalised groups (for diversity reasons) so as to ensure optimal organisational performance (Buckingham 2014). Hence, it is an opportune time to explore management research from a feminist perspective. The feminist perspective, or the perspective of women's voice, holds that people are equal but different regardless of gender, sexual orientation, social class, race or religion, and it calls for new assumptions and possibilities (Calvert & Ramsey 1992), including in knowledge creation. Knowledge creation warrants consistent reflecting as a process based inter alia on assumptions and methods that signal what knowledge is valid and valuable (Hesse-Biber 2012; Letherby 2003).

We merged our personal collection of texts on the topics of feminism and feminism in business or management with texts retrieved from a literature search on these topics, which we do not claim to be comprehensive. We performed a literature search of feminism or feminist studies in management, in English, using the search terms 'feminist theory' and 'business or management'. This search was done on the database ProQuest, and it yielded 89 studies of which 11 were usable. Only three of these pertained to the enactment of feminist research in management. A number of the articles returned by the search draw on philosophical discourses about feminism in management, which fall outside the scope of this overview as the intention is to clarify feminism and how it is enacted

or applied in management research. Hence, only a few articles met the inclusion criteria regarding feminism, generally, and feminism in management research, specifically. The few studies pertaining to a feminist perspective in management research seem to support the view that feminist research in management is lacking (Limerick & O'Leary 2006) or limited (Harding, Ford & Fotaki 2013) and its impact minimal (Calvert & Ramsey 1992). Thus, an opportunity exists to provide a brief overview of feminist thought and, in particular, its application in management research, which is the aim of this essay. Management and management research play a vital role in creating a just society as they influence employment, economic independence, human resource development, career progression, remuneration, the well-being of employees, value creation for the enterprise as well as wealth creation for society as a whole, thus enabling people to become self-actualised beings. Hence, from a management perspective, inequality is detrimental to organisational performance as the best-suited person for a job may be overlooked, based on inappropriate considerations.

Misconceptions about feminism, in particular in management research and practice, can be corrected. Hence, the purpose of this essay is to offer an overview of 'feminism' and its application in management research. Its aim is to clarify feminism particularly in respect of the field of management and by so doing to assist organisations and their members to value all of their employees (talent), especially women and other marginalised groups. Research outlines the necessity of having a talent-development plan, which clearly describes how organisations will retain and develop their talent (especially women) at different organisational or hierarchical

levels (Garcea *et al.* 2011). This could lead to behaviour like investing more strategically in all employees (Berger & Berger 2004), which in turn will support individuals to realise their full potential and to become the persons they are destined to be. These types of behaviour will ultimately create more value for the organisation, which will be beneficial to the organisation and the society(ies) in which it operates, including its investors. The reason for the benefits is that employees will derive more meaning from their work, positively influencing their well-being. The purpose of Chapter 5 is achieved by elaborating on the variety of feminist perspectives and their contribution to equality in the next section. This is followed by an overview of research in management from a feminist perspective rather than participating in the philosophical debate about feminism in management. Chapter 5 ends with conclusions and implications for management research and practice.

■ The variety of feminist perspectives

This section is primarily based on the works of Lorber (n.d.), Offen (1988) and bell hooks (2000), which give an exposition of feminism and the variety of feminist perspectives. Each perspective has made important contributions to improve the position of women in society but is not without limitations and/or critique (Lorber n.d.). Many debates occurred at the same time and are on-going. Thus, advances are not necessarily chronological or final. Moreover, a feminist may incorporate ideas from a range of perspectives (Lorber n.d.), complicating the matter. Different feminist perspectives have been identified (bell hooks 2000; Hesse-Biber 2012; Lorber n.d.; Thomas & Davies 2005), and these are commonly classified into three broad

categories, namely, gender-reform feminism, gender-resistant feminism and gender-revolution feminism (Lorber n.d.). A broad overview of which is presented below.

■ Gender-reform feminism

All of the perspectives in this category are rooted in liberal political philosophy that developed the idea of individual rights, a critique of capitalism, class-consciousness, anti-colonial politics and nation development. This category of feminism includes liberal, Marxist and social as well as development feminism, and it positions women according to these perspectives (Lorber n.d.). *Liberal feminism* maintains that differences between women and men are not based in biology, which essentially represents procreative differences. Their common humanity supersedes their procreative differentiation. Consequently, women and men are not different and should thus not be treated differently under the law. Hence, women should have the same rights as men, including the same educational as well as employment opportunities. Liberal feminism focuses its attention on visible sources of gender discrimination like gendered job markets and inequitable wage scales whilst making it possible for women to attain positions of authority, the professions, government and cultural institutions, just like their male counterparts. Liberal feminism's main strategy to remedy the inequality between women and men, especially in the job market, is anti-discrimination legislation and affirmative action. In this strategy, qualified people are sought out to redress imbalances in gender and ethnic representation. This remedial strategy includes encouraging the genders to train for occupations that are traditionally reserved for only one sex, for example women training as engineers

and males training as secretaries. Unfortunately, liberal feminism cannot overcome the prevailing belief that women and men are intrinsically different, but to a degree, it succeeds in showing that, although women are different from men, they are not inferior. Its contradiction, however, is that, if women and men were the same, it would not matter if a woman or a man fills a position.

□ **Marxist and social feminism**

Marxist and social feminism holds that Marx's capitalist theory was thought to apply to people of any social characteristic where persons owning means of production are part of the capital class and those who sell their labour for a wage are part of the workers or working class. However, in the capitalist societies of the 19th century, women were not allowed to own property, and their profits and wages (and their bodies) belonged to their fathers or husbands. Further to this, Marxist theory did not take into account housewives who worked in the house and cared for children. Women in this circumstance were economically dependent on men and not free. This omission is addressed by Marxist and socialist feminists, who recognise the role of the housewife as vital to maintaining the status quo and at the same time recognise it is a source of oppression and exploitation. Because a woman works in the house, she is economically dependent on her husband, and if she is employed outside the home, she is still responsible for the housework (cleaning, cooking and taking care of the children), hence she works twice as much for less compensation. Marxist and social feminism's remedy is full-time employment for women (outside the house) with provision for maternity leave (in some instances, for both genders). However, in the case of socialist economies,

these provisions may change with changing economic and political conditions, leaving women still vulnerable as state policies protect the interest of the state and not women because these policies depend on the state's economic needs. In socialist economies, the solution to gender inequality is devising comparable worth rather than affirmative action so as to ensure more equitable remuneration for females, making them less dependent on marriage or state subsidies for survival.

□ **Development feminism**

Development feminism addresses the economic exploitation of women in postcolonial countries as well as political issues of women's rights and oppressive cultural practices (such as child marriage, infanticide, female genital mutilation and honour executions) by stressing education for girls, maternity and child healthcare as well as economic resources for women, who contribute greatly to the support of their families. Generally, economically active women in postcolonial countries are paid less than men, which is a remnant of their colonial history. Historically, women supported the household by augmenting the meagre wage earned by the (migrant) husband by growing crops. However, under colonialism, women's traditional contribution to food production was undermined in favour of exportable crops, leaving them on less fertile land on which they could scarcely survive. Men were favoured in the production of exportable crops whilst remunerated with a slave's wage on which they could hardly survive themselves. Development feminism equated women's status with the control of economic resources, which they generally controlled as main producers of household food and distributors of surplus production. However, production is influenced by the technology

used as well as by kinship, the latter being important in society in determining the relative status of women and men. Some women may have a high status in their community, but in patriarchal societies, women and their production, including children, are still the property of men (father or husband). Hence, cultural values and practices still give men in these societies power over their wives and daughters when gender politics calls for marital rights and sexual autonomy.

■ Gender resistant feminism

This perspective emerged in response to the inequalities of everyday life such as a lack of acknowledgement for competently completing a job and being passed over for a job that involves taking charge. It includes radical, lesbian, psychoanalytical and standpoint feminism.

□ Radical feminism's theory

Radical feminism's theory of gender inequality goes beyond discrimination to deal with oppression and devise a gender politics of resistance to the dominant gender order (patriarchy). Patriarchy can be found wherever women and men are in contact with each other, whether in private or public. Patriarchy holds that women are not only different from men but also inferior (Jaffe 2010). It is deeply rooted in the consciousness of most men and hence difficult to eradicate. This oppression can best be resisted by forming women-only support groups to counter oppression and exploitation. Radical feminism blames values that are upholding male domination for the ills of the world and praises female values, which can be acquired by men, to foster harmony and equality. They also generally condemn

heterosexual relationships as coercive. This perspective does not attend to ethnic minorities and class differences. Consequently, radical feminism upsets women who are in heterosexual relationships and who are from the working class as well as from ethnic minority groups.

□ **Lesbian feminism**

Lesbian feminism takes this radical view further. Heterosexual relationships, which are oppressive and exploitive, are taken to their logical conclusion by turning to women for sexual love as well as intellectual companionship and emotional support. Women are more than just sexual and emotional relationships but a cultural community of women. Bisexual women are resisted by lesbian feminism.

□ **Psychoanalytical feminism**

Psychoanalytical feminism responds inter alia to Freud's theory of personality development. Men dominate women because of their unconscious contradictory needs, on the one hand, for women's emotionality and, on the other, for rejecting women as potential castrators. Women submit to men because of their 'unconscious' desire for emotional connectedness. This theory of feminism holds that gendered personalities are the outcome of the Oedipus complex where separation from the mother presents a crisis. This stems from the mother being the primary or dominant parent. It can be prevented by men taking up their role in the parental unit.

The former three perspectives converge in *standpoint feminism*, which confronts the dominant sources of knowledge and values, critiquing the thoughtless acceptance of scientific facts and the assumptions on which they are based, which produce gender

inequality. Standpoint feminism holds that women's voices are different from men's voices and that they must be heard if women want to challenge hegemonic values. Western society is divided on the basis of gender, and men do not realise or recognise that the knowledge they produce and the concepts they use come from their own experiences. Hence, they claim it (knowledge) as universal, general, neutral and objective. However, for women, this knowledge is partial, particular, masculine and subjective because they see the world from a different perspective where women have been excluded from much of science. If women produced knowledge, standpoint feminism holds that it is likely that it would have been much more in touch with the everyday material world and with the connectedness of people. It also contends that adding women to research teams is not enough but that they must have a feminist viewpoint, benefitting women's experience in the particular situation, which is critical of mainstream concepts that justify established lines of power and recognise that facts reflect current values and past history.

■ Gender revolution feminism

Feminist theories that confront the dominant social order by questioning the clarity of the categories comprising its hierarchies emerged. This feminist perspective disentangles the interconnecting structures of power and privileges that make one group of men (and women) dominant and ranges everyone else in a complex hierarchy of increasing disadvantage. They also examine the way in which cultural constructions, in particular in the mass media, justify and normalise inequality and subordinating practices. Multi-ethnic

feminism, men's feminism, social-construction feminism, post-modern feminism and queer theory are classified as part of this perspective of feminism and will be discussed below.

□ **Multi-ethnic feminism**

Multi-ethnic feminism argues that no single aspect of inequality is more important than any other. This perspective holds that ethnicity, social class, religion and gender, which are structurally interconnected relationships, involve complex social structures in which upper-class, heterosexual white men and women dominate 'lower-class' women and men as well as women and men of disadvantaged ethnicities and religions. Hence, a 'lesser' group is a social position in multiple systems of domination whilst oppression is expressed in different formats for the different groups. This perspective argues that not only ought the views and experiences of women be included, but women and men of different ethnic groups, religions, social classes and economic conditions ought to be represented because the values, identity and consciousness of the self are ingrained in all its statuses, which structure what people experience, do, feel and believe about the self and others.

□ **Men's feminism**

Men's feminism is a combination of a range of feminist perspectives, including social construction, multi-ethnic, psychoanalytic and development feminism as well as gay studies. It applies feminist theories to the study of men and masculinity, treating men as well as women as a gender and scrutinising masculinity as carefully as femininity in order to

arrive at a theory of masculinities, which takes into account the differences between men. There are neither universal masculine characteristics throughout all societies nor, it might be added, in any individual organisational setting. Considering that gender is relational and as such implanted in the structure of society, the analysis of men's feminism takes place according to the masculine-feminine oppositional relationship, including that of privilege, dominance, subordination, advantage and disadvantage. It disapproves of the pressure on men to only identify with their fathers without a close emotional bond and to be distant towards the women in their lives and their own children. Many men's feminists have also been critical of men's movements that promote patriarchal concepts of manhood as these movements seek to change individual attitudes rather than society's concept of gender inequality or the power differences amongst men.

Social-construction feminism

Social-construction feminism examines the structure of a gendered society as a whole because gender is deemed to be a society-wide institution that is ingrained in all major social organisations. Consequently, gender, as a social institution, determines the distribution of power, privilege and economic resources. Gendered norms and expectations are entrenched in both women's and men's sense of individual human identity, justifying the patriarchal approach to life that asserts unequal treatment. The pervasiveness of gendering results in the belief that gendering is biological and thus natural. This perspective focuses on the processes that create gender differences and that render the construction of gender invisible. Society sees gender difference owing to social processes like the

gendered division of chores in the home, gender segregation – including in sports – and gender typing of occupations. In the latter case, women and men do not do the same kind of work, and there is control, suppression and the elimination of gender-inappropriate behaviour and appearances such as aggressiveness in women and nurturing in men. These processes perpetuate inequalities through moral censure and stigmatisation whilst most people willingly follow their society's prescription for their status as these norms and expectations are ingrained in their individual sense of identity and worth. Enduring change is unlikely, except in cases where the pervasiveness of gender and its social construction are openly challenged at every level of society, a task that will not be easy.

□ **Post-modern feminism and queer theory**

Post-modern feminism and queer theory go the furthest in challenging gender categories as dual, oppositional and fixed whilst arguing that sexuality and gender are shifting, fluid, multifarious categories. This perspective explores the ways in which societies justify their beliefs about gender with ideological discourses (message), which are embedded in cultural representations or texts, including but not limited to art, fashion, literature, the mass media and religious liturgy. Like the analysis of any communication, attention is given to what is said, not said and implied as well as every aspect relating to the production of a message, including financing. As for any form of communication, the audience, by virtue of its interpretation of the message, which can be both open and direct as well as subliminal, conveys ideas about our identity and relationships with one another. These relationships are deemed

normal and acceptable whilst normality is rewarded and deviance is punished. As such, the focus is on individual actions.

From the above summary, it is clear that scholars hold many perspectives on feminism, and they have a diverse response to bringing about equality. Furthermore, one might reach a different analysis or interpretation if one consults different sources. Moreover, many feminists do not fit into a single category or perspective but draw on ideas from a number of categories and perspectives. What stands out as we summarise the perspectives of feminism presented above is that feminists search for explanations by means of which to describe the reasons why masculinity continues its hegemony over femininity and 'to explore political and social practices in order to bring about reform' (Grogan 1996:33). In this sense, feminists contend for the right to know, the nature and value of knowledge (and feminist knowledge within this), the relationship between the methods (epistemology or methodology) chosen, how they are used, and the knowledge that is produced as a result of them (Calvert & Ramsey 1992; Hesse-Biber 2012; Letherby 2003), which should be based on a careful analysis of the experience of everyone and not just a few.

■ **Feminism in management research**

According to Letherby (2003, 2013), a focus on the relationship between the self and other (the auto/biographical) necessarily encourages reflection on power relationships within research. In addition, the status of the claims that researchers can and cannot make from research and their relationship with and responsibility to respondents and the academic community should also be considered (see Letherby 2003, 2013) and, as such, accounted for

in research, including management research. Management is generally not considered a feminised occupation as men still outnumber women, particularly in the ranks of senior management, although women have progressively increased their representation in the ranks of senior management (Ross-Smith & Huppertz 2010). Consequently the (popular) assumption is that management texts are written by males, about males and for males whilst women are excluded as role-players (Crainer 2003 in Kelan 2008). It is contended that management texts with a masculine bias may be failing to keep pace with changes in the world of work such as flexible forms of employment (Kelan 2008). Moreover, the new worker is expected to benefit from flexibility, freedom and accountability. However, these very concepts are gendered, that is, taken as masculine, which need careful consideration if gender in management is to be taken seriously as a practice involving concern for equality (Kelan 2008). Hence, Kelan (2008) explores how far management texts have changed to reflect the new reality of work. Paying close attention to gender construction in management provides insight into the way in which a particular reality is constructed, thus shaping perceptions of reality (Kelan 2008). Moreover, gendered language is a powerful transmitter of who is seen as appropriate or suitable for a job, irrespective of whether the term is explicit or subtle, due to its underlying meaning that influences the way in which people interact (Kelan 2008). Kelan (2008) states that she uses discourse analysis (language and the ideology that the language in use supports and makes possible) as per Potter and Whetteral (1987) as it is a useful tool by means of which to identify which gender

representations are mobilised in the newer management literature and how it creates and validates knowledge. Mainstream management texts authored by management gurus (men and women) spanning a wide audience were analysed as part of Kelan's study. The authors of the texts ranged from MBA students to practicing managers, to newcomers in the workplace. The texts were coded according to the qualities that new workers are required to have and according to new career structures where the general use of gender was also examined for what was left out and/or glossed over. The discourse analysis resulted in three seeming progressive ways in which people talk about gender, namely: (1) an awareness of gender issues, showing that women are no longer absent from management, (2) the individualisation of discourse, showing that the factors that previously hampered equality are losing their importance and (3) the ideal discourse, representing women as the new ideal worker. Kelan (2008) contends that these representations of women are at best superficial and perpetuate inequality in masked ways. For example, women are the workers of the future because they have the right skills, but they are paid less for the same work and are unable to advance beyond the so-called 'glass ceiling'. These differences are accounted for by typical stereotypical roles within the private lives of individuals where men primarily take on the role of breadwinner with women taking primarily caregiving roles and secondarily breadwinner roles (which is supported by unequal pay and opportunity in the workplace and social-policy provision). If gender disappears from the agenda, power lines continue to operate along gendered lines, although in an obscured

fashion. Thus, the focus ought to move to the way in which gender is used and to the way in which writing needs to be done differently from the masculine agenda. It ought to be pointed out that, although this study was published in 2008, the books of most so-called 'gurus' generally dated back to 2001, which are outdated, considering the changing environment in which we find ourselves.

Limerick and O'Leary (2006) provide examples of qualitative research based on feminist epistemological assumptions. They contend that this research reinvents management theory by providing new understandings. These understandings address the demands of managing contemporary workplaces, which are characterised by increasing diversity and discontinuous change. They used three research projects in Australia, describing research processes and outcomes which aim to reflexively attend to a range of voices as well as researcher and researched subjectivities. In the research projects, they demonstrate the way in which feminist epistemologies are enacted and thus provide tangible examples of feminist (qualitative) research in management. They outline the feminist epistemological assumptions that they sought to enact because such a practice is in keeping with the principle of being visible and transparent about the subjectivities that researchers bring to their research whilst assisting reflexive endeavours to identify the tensions and contradictions that this perspective may involve. The intention of reflexivity is to gain insight into assumptions involving gender bias that underlies the inquiry. Like Kelan (2008), Limerick and O'Leary (2006) argue that overlooking gender in management research perpetuates the status quo, which both excludes women and fails to understand the practical

and theoretical consequences of such an omission. In a study of women who achieved success in leadership positions in the educational sector, they conclude that women lead differently. In particular, collaborative work, which differs from the style of men as the dominant group in positions of leadership, is part of their success. In the study about mentoring, they find that sponsorship from higher-ranking colleagues is helpful. However, mentoring is ill-defined, and the women (participants) seem to prefer more reciprocal relationships. Networking, at all levels, which are easily accessible, also contributes to success. The difference between networking and mentoring is the intensity of the relationship, hierarchical positions and a lack of reciprocity. Mentoring is associated with a 'male-gendered' concept, which needs to be redefined in neutral words. In the final study about ethics in the public service, it is again pointed out that dominant ethical understandings are a male construction, which may not necessarily fit women's views and experience. The study also points out that each of the women studied had multiple voices regarding the different aspects of ethics. New ways of working necessitate a different understanding of ethics. This requires a re-conceptualisation of ethics, reflecting a relational conceptualisation. Once again, it needs to be noted that these studies draw on outdated literature from the 1990s, which may have changed with developments in recent times.

The study of Griffen (2015) attends to the global financial crisis from a feminist perspective, using a feminist discourse analysis to study issues of gender and governance. She (Griffen 2015) argues that the global financial crisis had the following effect:

[T]he emergence of crisis governance feminism has enabled existing structures and mechanisms of gendered privilege, to suppress calls for the

overhaul of the financial industry and re-entrenched their power in the political economy. (p. 50)

In her analysis, she examines the ways in which financial crises became an everyday technique of gendered governance. She does this by asking questions, including how feminist critique and knowledge have contributed towards and promoted the status quo. Taking gender seriously in the financial crisis, she contends, requires thinking carefully about how narratives about crisis have emerged and unfolded to effect women and men in specific – and malevolent – ways. The focus of the study is on governance that appeared after the crisis, and she maintains that the discourse involves an ongoing failure to reform the foundations of global financial systems, and the perpetuation of a ‘business as usual’ ethic that serves to promote global finance as the domain (preserve) of a privileged, neo-classical, male elite. In this regard, the UK Labour Party’s deputy leader, Harriet Harman, goes a step further when she submits that the liability for the financial crisis lies resolutely in the hands of men by saying the following: ‘[S]omebody did say... that if it had been Lehman Sisters, rather than Lehman Brothers, then there may not have been as much turmoil’ (Morris 2009). Griffen (2015) highlights the point that financial crises have an impact on labour markets, household income, social services, work burden and human development in deep and lasting ways, especially in the case of the Asian financial crisis. In addition, women in South Korea lost their jobs at a rate of seven times that of men. In developing countries, industries like textiles and apparel that employ mainly female workers were also hit hard. Women are not well presented in senior management (less than 20%) whilst their male counterparts earn up to 24% more.

According to social institutions like the IMF, the financial crisis is generally attributed to external variables like reckless lending and

insufficient oversight whilst internal weaknesses are ignored. There seems to be no solution to the crisis even years after its commencement. Attention is drawn to how feminists supporting neo-liberal economics eschew social change, thus supporting inequalities, probably because they see themselves as economists favouring technical measurements. The article draws on recent literature, and it seems that the financial crises are well documented from a feminist perspective. This analysis of gender inequality supports the conclusions of the study by Kelan (2008). Also, in line with the reasoning that the negative effects of the global financial crisis would not have happened if there had been a higher representation of women on boards (Koch 2015), the issue of promoting women on corporate boards has also gained significant attention.

In all the feminist studies cited here, it is clear that the use of language plays an important role in reinforcing gender inequality. On the one hand, scripts written by elite actors and institutions are passively absorbed by people at grassroots level (the masses) and fail entirely to consider the many ways in which everyday actions facilitate the status quo. On the other hand, because of their training which they do not question from a feminist perspective, women who are trained in a specific field may be oblivious to the way in which the standard texts and practices foster inequality.

■ Conclusion

Feminism is often misunderstood, and this misunderstanding is exacerbated by the fact that there is no common definition or perspective describing feminism. The different views also usher in tensions between competing perspectives. Nevertheless, feminism is essentially about the identity of women, philosophically and

socially. This identity transcends gender, sex and sexuality as women are more than a body because they are defined by a convergence of factors that consider their place in society. Feminism is also about equality, not only for women but for all marginalised groups regardless of gender, sexual orientation, race, social class or religion. Gender, sex and sexuality are socially constructed concepts. These are based in some form of knowledge (philosophy), grounded in belief rather than scientific evidence. Hence, the questions of what is to know, how we come to know and who is to know are central concepts in feminism as inequality is a societal rather than an individual matter. Inequality is deeply ingrained in society and is affecting all social institutions like marriage, family, work and the economy, politics, arts, culture and language. Knowledge and meaning are conveyed by these social structures and can thus be more broadly viewed in social institutions like art, fashion, mass media, religious liturgy, business organisation, schools and universities where quality can only be achieved if society counters *inequality*. When women are aware of their true identity, they will be able to participate fruitfully in equality debates to bring about change by questioning the time-honoured secular knowledge or beliefs about women and equality. This requires a deep understanding of empowerment at the individual level, having a voice, knowing how they are different, knowing what cultural and social expectations they carry and how they carry them in a personal and professional way. As such, women should not thoughtlessly accept the subliminal messages of the norm in relating to the other as a consequence of the socially ingrained norms. Rather they should make visible the implications of what is said, not said and

glossed over, especially in their professional field, which may result in surprising outcomes as revealed by especially the studies by Kelan (2008) and Griffin (2015). It is useful to take on a feminist perspective in addition to the professional perspective in order to expose seemingly innocent differences (which manifest themselves in inequality). Although one can acknowledge that gender 'is a difference that makes a difference' (Di Stephano 1990:78), gender is not the only signifier of difference and does not always work in isolation of other differences in determining inequality of opportunity and experience (Brown & Misra 2003; Holvino 2010; Marchbank & Letherby 2014). Furthermore, it is important to understand why women who 'make it' do not always work collaboratively with those that hope to follow them (Mavin 2008) and to acknowledge that men too may be disadvantaged by gendered expectations which are often exacerbated by workplace and social policy (Connell 2005; Marchbank & Letherby 2014).

Following this overview, it is recommended that the academic or scholarly management literature authored by women, like Mary Parker-Follett, Lilian Gilbreth, Kathleen Eisenhardt, Margaret Peteraf and Dorothy Marcic, be analysed from a feminist perspective to see how they used language as well as addressed gender difference and inequality. This would add to a consideration of the measurable change we have been looking for since the early days of the female pioneer.

■ Chapter 5: Summary

Chapter 5 gives a brief overview of the application of feminism in management research. It is achieved through a summary of selected feminist theory and a survey of literature pertaining to feminist

research in management. The findings show feminism to be concerned with the identity of women, which transcends gender, sex and sexuality, promoting equality on economic, legal, political and social terms. Gender, sex and sexuality are social constructs, which are deeply ingrained in societies. These constructs are maintained by social institutions advocating for what is popularly defined as 'normal' and acceptable as well as unacceptable and potentially punishable. Generally, people, including women, consume these normative messages uncritically with the result that a patriarchal system in which women, children and other minorities are made subservient becomes subliminally reinforced. Language is a powerful mechanism in propagating this social paradigm, observed in the available research on management from a feminist perspective. Seemingly innocent words preserve the status quo, a situation necessitating critical reflection in order to bring about equality. It is recommended that scholarly management texts written by women be discursively analysed so as to identify which gender representations are mobilised and whether anything can be found to have changed since the pioneering works of Mary Parker-Follett and Lilian Gilbreth.

Transcending paradox in the realm of South African executive pay

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Introduction

Executive pay has long been a point of contention in the world of work (e.g. Thomas & Hill 2014). The sheer scale of remuneration afforded to executives often dwarfs that of lower-level employees (e.g. Ferdman 2014; Kiatpongsan & Norton 2014; PE Corporate Services 2014; Preston 2014; PWC 2014). The notion that such pay is just reward for the application, acquisition and retention of complex and scarce skills has been challenged for many reasons, notably when companies do poorly yet executive pay remains high

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(e.g. CIPD 2015b). The structures of executive pay are often obscure and complex, engendering mistrust and miscommunication. Organisational and economic contexts also increasingly provide reasons for social hostility against high executive pay, a situation that Chapter 6 argues is particularly heightened in fragile developing countries like South Africa (e.g. Rossouw 2015).

Chapter 6 views the issue of executive pay as an organisational paradox, characterised by competing but contemporaneously valid claims. I argue that approaching the issue as a paradox rather than dualities of opinions may help to move the debate forward. With this approach in mind, Chapter 6 applies very specific models and frameworks for organisational paradoxes as suggested by Lewis (2000) and Smith and Lewis (2011) in particular. As suggested above, the issue will be contextualised in South Africa although the arguments here could probably be applied in almost all industrialised countries.

Accordingly, the first section below discusses the face issues and tensions within the executive-pay debates worldwide. Thereafter, I discuss the economic rationales that are commonly used to justify executive pay. Thirdly, specific elements of the South African context that may render the executive-pay debate particularly trenchant and pressing are addressed. The fourth section discusses organisational paradoxes and locates executive pay as a possible paradox. Further sections unpack in detail the possible manifestations and effects of paradox within the executive pay realm. Finally, Chapter 6 applies Smith and Lewis's (2011) discussion of possible solutions for organisational paradoxes to executive remuneration, which suggests avenues out of the current paralysis of executive pay discussions towards the possibility of praxis.

■ Issues of contention within executive pay

This section argues that there are three major areas of potential tension in the realm of executive pay, namely:

- The quantum of the pay gap between top executives and the lowest paid or average worker.
- The structure of executive pay packages.
- The organisational superstructures that govern the design, level and continuation of executive pay.

Here I discuss these elements with a minimum of active critique but rather seek to lay out the issues. Subsequent sections discuss theories or forces in support of or in opposition to the current state of executive pay, after which tensions within and between these elements are juxtaposed with a focus on the creation of paradox.

■ The quantum of the pay gap

This section briefly illustrates the pay gap through some conventional comparative figures of the type often trumpeted in the popular press.

On the world stage, the pay gap can often be massive indeed and has seemingly accelerated over the past 30 years (AFL-CIO 2014; McSmith 2015). Within the United States for example, recent data suggests that CEO pay in large public companies has risen steadily from 40 times that of the average employee in 1982 to a multiple of 331 in 2013, and CEOs in this group earned on average 774 times the salary of the lowest paid worker in their firms during this period (AFL-CIO 2014). This ratio is not necessarily as high in other countries. For example, Ferdman (2014) reports a range of pay gaps

between CEOs and the average worker from other countries, including Switzerland (148:1), Germany (147:1), Spain (127:1), Czech Republic (110:1), France (104:1), Australia (93:1), Sweden (89:1), the United Kingdom (84:1), Israel (76:1) and Japan (67:1).

Of course, this issue is not only about CEOs but also about the entire executive team of firms. Unfortunately, the entirety of the discussion focuses on CEO pay for its obvious symbolic and sensationalist properties. The CEO-worker pay gap can probably be seen as a proxy for the broader executive-pay regime without relying too heavily on numerical exactitudes.

In South Africa, the executive pay gap follows these worldwide trends (Massie, Collier & Crotty 2014). PWC (2014:25) report that the pay gap between CEOs and entry-level workers averages around 150:1 for listed firms with larger firms reaching 300:1 and global mining companies – which historically have been major employers in South Africa – reaching over 600:1. Preston (2014) estimated the gap between CEOs and average workers at 73 times the salary of the latter (noting the difference between this benchmark and entry-level comparisons). In addition, Preston (2014) estimates the ratio between the average South African CEO's pay and the average South African worker's pay to be 144:1. This discrepancy highlights the fact that the pay of average company workers is skewed upwards by those working in international operations and that socio-economic realities as discussed further below in fact inflate the pay gap within the South African context. The South African market has followed the international trend of generally accelerating wage gaps over time (Preston 2014) with the exception of one year of decrease, which is surprising in the face of social trends and events as discussed

further below. Finally, a study of the purchasing-power parity of compensation between 2009 and 2011 names South African executives as the best paid worldwide in local buying terms and second only to the United States in 2012 (PE Corporate Services 2014).

One further analysis has begun to emerge in South Africa, namely a comparison of CEO pay to that of an unemployed person on a government grant. This unflattering analysis is embedded in the social context mentioned later in Chapter 6, including an exceptionally high level of unemployment (nearing one third of the population) and the concomitantly large reliance on social grants. For instance, Holmes (2014) reports that the highest paid South African CEO earned 486 000 times what someone on a child support grant would earn.

It is to be noted that extant data tend to be on larger firms listed on the stock exchange. Private firms, in particular, are under little or no obligation to disclose executive pay, and therefore, relatively little is known about them in comparison to listed firms. However, some evidence exists, suggesting that private-company CEOs may earn far less than their publically trading company peers (e.g. Chief Executive 2016). This is an important point for economies in which the majority of employment occurs within smaller firms. Conversely, in economies where large listed firms dominate employment, the wage gap perhaps again widens when the comparison is made within the firm as is often the case.

In conclusion, there is little doubt that the size of the wage gap is large. However, when non-listed firms are considered, it may be far smaller than usually thought. However, clearly the sheer quantum of

the gap is irrelevant without further analysis, which must include the rationales for such a situation as well as the broader ways in which societal stakeholders make sense of the issue. These issues feed the potential for paradox as discussed later in Chapter 6.

The second aspect of executive pay addressed in Chapter 6 involves features of its typical design.

■ The design of executive pay packages

As will be indicated, critique of executive pay arises not only from its quantum but also from the ways in which it is structured.

The array of substantive components in executive pay packages is broad (e.g. Ellig 2014). In addition to cash salary, executives are often paid through cash bonuses, stock (either straight awards of blocks of shares or stock options) and perquisites (perks). There are several features in these non-salary elements that stimulate complexity and have the potential to obfuscate. As discussed later, mistrust may arise from such structures.

Beginning with executive bonuses (I use the term bonuses to encompass incentives), many executive packages contain large bonus elements that are supposedly designed to link executive pay to shorter-term performance targets. In many economies, a large portion or even the majority of executive pay arises from such devices. However, it is common practice for the bases for performance targets and associated pay-outs to be hidden with only the quanta of pay-outs disclosed in certain cases. As noted below, recent critique of executive bonuses includes a perception that they have been made too easy to achieve and lack real links to meaningful firm performance

(e.g. Bussin 2015; CIPD 2015b; PE Corporate Services 2014; PWC 2014).

In addition, longer-term, share-based payments are also common. The following are included in these:

- Straight-share awards mean that the executive is given a block of company shares immediately, often with restrictions such as minimum holding periods. The idea behind these shares, as discussed below, is that the executive will seek to increase the share price in order to improve the value of his or her own shares, therefore supposedly acting in the interests of shareholders. Later in Chapter 6. I discuss issues and contradictions inherent in this idea.
- Alternatively, share options award executives the right to purchase a block of shares on a prescribed future date at a stipulated price. Once again, the notion is that the executive seeks to increase the share price over the option price so that he or she will acquire shares that are more valuable than the price paid. Sometimes, the block of shares acquired thereafter must also be held for a period or comes with other restrictions which I discuss later.

Share-based awards are perhaps the most obscure form of payment, fully intelligible only to those versed in investment, corporate finance and taxation theory and law. Their longer-term nature makes their exact value hard to interpret even for experts, and the mechanisms that derive their ultimate value are essentially as complex as the drivers of share prices themselves. Accordingly, serious questions have been raised regarding whether executives truly react to share awards with increased performance or essentially rely on the serendipity of stock-market fluctuations or other non-performance

actions such as reducing research or training expenditure to inflate the value (e.g. McGregor 2014).

Perquisites are a final and sometimes undervalued element in the executive pay package. One exemplar for the potential value of 'perks' is Jack Welch, the ex-CEO of General Electric. According to MarketWatch (2009), his pay package on retirement entailed the following:

The year after he retired on Sept. 30, 2001, Welch got roughly \$2.5 million in perks under the agreement, according to the Securities and Exchange Commission, which charged GE in 2004 with failing to tell shareholders enough about the package. The perks included access to GE aircraft for unlimited personal use and for business travel; exclusive use of a furnished New York City apartment that, according to GE, in 2003, had a rental value of roughly \$50 000 a month and a resale value of more than \$11 million; unrestricted access to a chauffeured limousine driven by security professionals; a leased Mercedes Benz; office space in New York City and Connecticut; professional estate and tax advice; a personal assistant; communications systems and networks at Welch's homes, including television, fax, phone and computer systems, with technical support; bodyguard security for speaking engagements; installation of a security system in one of Welch's homes and continued maintenance of security systems GE previously installed in three of Welch's other homes. More perks were ... floor-level seats at New York Knicks games, courtside seats at the U.S. Open and some dining bills at Jean Georges, a three-star Michelin restaurant where the tasting menu currently costs almost \$150 per person. All costs associated with the New York apartment were allegedly covered in the package too, including wine, food, laundry, toiletries and newspapers. Realizing he faced 'a huge perception problem', Welch quickly gave up most of the perks, according to a 2005 interview in the Boston Globe. However, he didn't apologize, telling the newspaper the benefits were part of a contract that helped GE keep him at the company longer. (n.p.)

Many such perquisites are not necessarily disclosed to stakeholders except in the few economies with more stringent reporting requirements.

■ Organisational governance superstructures

Another structural element that may invite question is the superstructures of decision-making in the setting of executive pay levels and structure.

In many organisations and economies, notably publically funded firms but including many others, a board is responsible for agreeing executive pay, guided by the recommendations of a remuneration sub-committee or the like (e.g. Ellig 2014). Board deliberations on the matter are often guided by historical practice and commonly also involve remuneration consultants.

It is common for responsible board members to include past executives of the firm or similar firms as non-executive members, and of course, boards include executive members. Chairpersons of boards, too, are often past or even current CEOs or at least executives. A common complaint is therefore that past behaviour repeats itself through these social networks or self-validating cycles (Belliveau, O'Reilly & Wade 1996).

Hypothetically, the ownership (shareholders) of firms are supposed to hold boards accountable for issues such as executive pay. The role of shareholders in influencing a board's decisions concerning executive pay is, however, often described as weak or compliant (e.g. Pratley 2015), even in situations where shareholders have direct voting rights over executive pay (as opposed to indirect power only in their choice of board members). The say of other stakeholders may be limited or non-existent.

Another superstructure that has been noted by a reviewer of Chapter 6 is that of political or government patronage. This is especially true in the public sector and state-owned enterprises where executive positions can be very lucrative indeed and are awarded on the basis of party affiliations, personal patronage and the like.

It is true that much work has been done in many economies to limit possible structural weaknesses in board decisions. I discuss some of these initiatives later in Chapter 6.

The next sections contrast theories and forces that seemingly support or at least explain the current state of executive pay with those that have increasingly led to serious critique.

■ Economic rationales for the status quo of executive pay

Several conventional, neo-classical economic theories exist that may help to explain and possibly provide some support for high levels of executive pay or even large pay gaps in particular although each can be critiqued as seen later.

■ Support for large pay gaps: Tournament theory

A key area of literature underpinning the structure of executive pay, at least as regards the size of the pay gap, is tournament theory (Connelly *et al.* 2014; Lazear & Rosen 1981; Rosen 1986).

In general, tournament theory proposes that optimal social structures in certain cases – notably where individual differences are key – involve offering exceptionally large prizes to the winners of

some well-understood tournament. The general notion is that the incentive effect of large prizes is not limited to the final winner but rather occurs across the entire pool of participants competing for the large prize. These participants will expend considerable effort in trying to outdo each other. The winner(s), by any margin, are awarded the prizes, providing the reinforcement for future iterations of the tournament. Tournaments have been used to explain many structures, from the obvious application to sporting tournaments (e.g. Bothner, Kang & Stuart 2007) to situations as diverse as innovation contests (Boudreau, Lacetera & Lakhani 2011), competition between broiler-chicken farmers to gain sales to large buyers (Knoeber & Thurman 1994), multiunit franchising (Gillis *et al.* 2011) and many others.

Executive pay has served as a key organisational exemplar of tournament theory (e.g. Eriksson 1999; Kale, Reis & Venkateswaran 2009; Lazear & Rosen 1981). In this explanation, the large prize of executive pay serves not as an incentive for current executives but rather as incentive for all those at lower levels competing for future promotion. The rationale is therefore that the positive effects of this stratospheric pay on performance are not necessarily located in the executives but rather dispersed through the layers and generations of mid-tier managers in particular who seek to outperform each other to be advanced to the high remuneration available to executives. There are, of course, various complexities and addendums to this theory as described further below.

Various findings in tournament theory help explain inter-firm differences. Notably, once the tournament becomes a multiple-agent situation, which is of course realistic, the chance of any one individual winning promotion through to the executive suite decreases, and in fact, the size of the executive salaries must then

increase to account for the lower chances of advancement (McLaughlin 1988).

Does tournament theory indeed operate in the way it is described by Lazear and Rosen (1980) when looking at pay dispersion? There is substantial evidence to support the positivist predictions of tournament theory in the executive-pay arena (see Connelly *et al.* 2014 for a summary).

This explanation is of course not the sole explanation for executive pay. There are several other key economic imperatives, as discussed next.

■ **Attraction and retention of competent executives**

A second argument for high executive pay is that it is necessary to attract and retain competent executives, who – it is claimed – operate in a global managerial market with relatively high ability to move between positions (e.g. CIPD 2015a; PE Corporate Services 2014).

This argument clearly presupposes the fact that the labour market for executives has settled on high wages as the optimal equilibrium situation and therefore implicitly that ‘this is what these people are worth.’ I note the contradiction between this view and tournament theory later in the paper. Many recent sources refute the assumed inherent ‘worth’ of executives, noting for instance that high pay does not always correspond with high performance (see the next section for more on this point).

International labour markets have complicated the picture for developing countries such as South Africa where it is often claimed that executives must be paid the local equivalent of the

salary for a USA or European executive (e.g. PWC 2014). This sometimes disingenuous argument assumes easy emigration by South African executives, obscures cost of living and investment differences and, when the comparison is with the USA, ignores the fact that the USA is an outlier with regard to pay dispersion as discussed earlier and surely cannot be used as a sensible point of departure.

■ Executive performance

Performance is a multifaceted concept when talking about executives. In usual terms, the successful execution of the functional tasks and strategies associated with their own areas of responsibility would be one facet of performance. However, executives are also responsible for broader strategy, the growth of company value in order to keep reimbursing the providers of capital and general leadership, amongst others.

As will be discussed later, tournament theory says little about the subsequent performance of executives (the ‘winners’ of the tournament in this case) unless they begin competing for another level. With executives, it may be true that some compete for CEO jobs, but many may not. Therefore, CEOs themselves and executives with little hope of becoming CEOs may have no further tournament. Therefore, using pay to stimulate executive performance remains an issue. The ‘Peter’ principle may then occur in such systems where individuals dominate performance at a lower level, becoming executives as a result. However, in fact, they are not suited for executive-level roles such as leadership and interdependent decision-making (Lazear 2004).

The dominance of short and long-term variable pay components within executive pay packages, typically comprised of bonuses and shares, is designed to link remuneration with the organisation's performance. Accusations and findings that the pay of top executives are linked to performance in a limited way (e.g. Jensen & Murphy 1990a, 1990b) led to a modern-day shift towards a massive increase in such components within executive pay packages (CIPD 2015a). This shift is generally seen as a desirable virtue, holding executives accountable for their contribution to the organisation. Principal-agent theory (examining the gap in interests between shareholders as principals and executives as their agents) is often cited as an underlying reason for both high and performance-based executive pay with the assumption that this aligns executive interests with owners (e.g. Bussin 2015).

Unfortunately, as was discussed earlier, these bonus and share elements are the most obscure parts of executive pay and have been used to inflate the pay gap, partly perhaps as a compensation for the increased exposure to exogenous risk.

Recent studies in South Africa are limited but mostly in support of a modest link between executive remuneration and organisational performance. Deysel and Kruger (2015) find positive relationships between pay and performance for South African banking CEOs, and Scholtz and Smit (2012) find stronger correlations in smaller companies listed on the Alternative Exchange (AltX). Similarly, Crafford (2015) finds positive relationships in JSE-listed firms. Similar links are found in various earlier studies (Modau 2013; Nel 2012; Van Blerck 2012).

Aside from within-package structure, the high level of executive pay itself may create a minimal incentive for executives, namely the motivation to perform well enough to not be fired. Dismissal would

mean losing their large salaries, potentially losing reputation and therefore not being able to find comparable jobs elsewhere. This argument partly parallels efficiency wage theory (e.g. Shapiro & Stiglitz 1984), which suggests that above-market or above-equilibrium wages may be efficient if it attracts higher-quality personnel (as mentioned above) and if it inspires high performance levels in the face of the threat of dismissal. I return to this argument as one element of paradox later in Chapter 6.

■ The antithetical social context of executive pay

Arguments against elements of executive pay have become commonplace. One frequent theme emerges in these arguments: The social contexts within which modern organisations operate are often critical forces that drive and stimulate opposition. Increasingly, social norms seem to stand in opposition to the quanta and structures of executive pay (e.g. CIPD 2015b; Ferdman 2014; Viviers 2015). Social activism against the practice has increased, notably in the press (e.g. Bronkhorst 2014; Pratley 2015; Rossouw 2015; Van Niekerk 2015).

Especially important in such voices are specific events that stimulate critique, such as the 2008 financial crash, the spectacular failure of large corporations such as Enron and Arthur Anderson and the coinciding of poor organisational performance with large executive pay-outs. These events act to undermine the foundational arguments in support of executive pay. For instance, the 2008 crash and aforementioned corporate failures seemingly contradicted the notion that the relevant highly paid executives were acting with competence and ethical leadership and were therefore worth their exorbitant packages (e.g. Bebchuk 2012). In addition, when corporations do poorly whilst their

executives are paid well – especially through bonuses or cashing in of large share options or the like – the foundational notion that executive pay has been linked to performance seems undermined.

South Africa stands as a good and perhaps extreme example of a social context that informs critique, for a variety of reasons.

Firstly, South Africa suffers from particularly stark poverty and inequality, with one of the highest Gini coefficients (the most common measure for inequality) in the world. Many commentators point to the wide pay gap as presenting a problem specifically in this context, suggesting that social unrest may occur as a result (e.g. Bronkhorst 2014; PE Corporate Services 2014).

Certainly, social unrest seems to have become more of a norm than an exception in South Africa over the past decade. Strikes and community protests have become common, and the low wages of workers contrasting with the high pay for executives are often cited as one of the reasons. The exemplar of this is perhaps the massacre at Marikana where striking workers and unionists clashed with each other and with police and mine security over a period of several months during 2012. This eventually led to mass retaliation by the police against a gathering of workers, which left 34 miners dead and 78 wounded. Ultimately, the disastrous events at Marikana arose partly because of miner demands for substantial increases in their pay as well as because of their criticism of management.

South Africa also suffers from extreme levels of unemployment as well as a large reliance on government grants and other forms of social welfare (e.g. Lee & Rees 2016). As discussed earlier, this invites unflattering comparisons between executives and the poverty-level income of unemployed individuals, never mind comparisons with the employed.

The racial history of South Africa is another particular social touchpoint pertinent to the executive-pay issue. The apartheid regime afforded privilege, wealth, position and education to white South Africans whilst systematically denying or downgrading the majority, notably black South Africans. The post-apartheid era heralded the promise of change, yet little has indeed come of such dreams in the boardroom where white ownership of capital and executive power remains the norm by far. Even ambitious 'Black Economic Empowerment' initiatives have concentrated new ownership and corporate power in a small black elite rather than widening the executive and ownership pool substantially.

Similar concerns have been voiced with regard to the gender issue in South Africa where managerial power, say and pay have remained largely in the hands of male executives.

In sum, the executive pay gap stands as one anchor in the glaring and societally unsustainable inequality problem faced by South Africa. Executives themselves are a relatively small group, and therefore, using their salaries as the upper end of measures such as the Gini coefficient is perhaps debatable. However, executives represent a system of entrenched white and male control of capital and power that has been slow to change and, as a whole, is awash with inequality.

Interestingly, another element of the South African social context is severe skills shortages and a relative 'brain drain' of high-skill managerial and professional talent due to emigration. Hypothetically, as stated earlier, this might be seen as a reason for higher executive pay and is indeed often used as a reason. However, in the balance of social discourse, it is not seen as mitigating the extremities of the pay gap.

■ Lack of logical development in opposition arguments

Unfortunately, much of the writing in opposition to the status quo that is based on social context suffers from several maladies, including a lack of fully developed logic and all too often a lack of real alternatives. Essentially, the majority of counterarguments seem essentially to claim that ‘large executive pay in contrast to others is wrong because we live in unstable times’ or ‘large executive pay in contrast to others is wrong because others are so much poorer.’

These arguments lack any sort of real logic other than a prediction of social unrest and opposition, which is undoubtedly relevant. However, it is to be hoped that stronger counters can be mustered. It is perhaps in a combination of systematic attacks on the economic rationales for the current state of executive pay, combined with social context, that real momentum can be achieved.

■ Executive pay as paradox

As stated in the introduction, Chapter 6 proposes to treat executive pay in the light of paradox rather than as mere tensions which might be resolved by choice on one ‘side’. I begin by discussing organisational paradox in general and then move on to discussing specific elements of the executive-pay issue which may be paradoxical.

■ Introduction to paradox in organisations

Recent literature has increasingly viewed organisations as arenas of paradoxes e.g. (Eisenhardt 2000; Lewis 2000; Lüscher & Lewis 2008; Smith & Lewis 2011). Lewis (2000:760) defines paradox as ‘contradictory yet interrelated elements that seem logical in isolation

but absurd and irrational when appearing simultaneously' and 'cognitively or socially constructed polarities that mask the simultaneity of conflicting truths' (Lewis 2000:761).

Therefore, at the heart of any social paradox stand coexisting ideas or situations that seem right and defensible on their own, yet they are in conceptual contrast to one another, creating tension.

Reconciling paradox often seems impossible at first blush. The inherent tensions and oppositional forces within a paradox create cognitive dissonance, mental blocks and personal defence mechanisms that can be daunting. We therefore tend to get stuck in simple binary thinking, choosing a side and finding it difficult to face the paradox without seeking to reduce or destroy the power of the opposing element.

Lewis (2000) notes that many organisational actors faced with a paradox experience cognitive dissonance and damage to the ego that result in the activation of varied defence mechanisms. Citing six specific defence strategies listed by Smith and Berg (1987) and Vince and Broussine (1996), Lewis (2000:763) lists the following:

- *Splitting* involves 'further polarising contradictions, e.g. forming subgroups or artificial we/they distinctions that mask similarities.' I discuss the potential splitting effects of executive pay below.
- *Projection* involves 'transfer of conflicting attributes or feelings, often onto a scapegoat or repository of bad feelings.' For instance, we often see especially well-paid CEOs cited as examples of an overall problem with no attempt to comprehend whether the individual is deserving of such pay.
- *Repression or denial* involves the 'blocking of awareness of tenuous experiences or memories.' One may argue that years of non-activism by shareholders may evince this response.

- *Regression* involves ‘resorting to understandings or actions that have provided security in the past.’ I would argue that circular reference to the economic rationale for high and growing executive pay forms such a response.
- *Reaction formation* involves ‘excessively manifesting the feeling or practice opposite to the threatening one.’ In this case, kneejerk calls for caps to executive pay or the like with no systematic way in which to address the quantum of these or other complex factors would seem to fulfil such a defence mechanism.
- *Ambivalence* involves ‘the compromise of conflicting emotions within “lukewarm” reactions that lose the vitality of extremes.’ One again, shareholders often appear ambivalent, hypothetically willing to address the issue but ultimately unwilling to change anything.

As an example of the mental difficulties presented by a paradox, a reviewer of the first draft of Chapter 6 suggested the following stance as a sole substantive comment: ‘My concern is the absence of a discussion of inequality, and how unjustified high remuneration for CEOs perpetuate inequality, safeguarding the superiority of white males.’ This is undoubtedly the common stance of critical theorists and is certainly the sentiment of this writer. However, note how this stance fails utterly to deal with executive pay *as* a paradox, therefore resembling the paralysing effects of regression, reaction formation and the like. The lack of a simultaneous engagement with the forces *for* high executive pay whilst standing *against* executive pay is precisely what Chapter 6 proposes has hamstrung progress in the debate.

Paradox studies would therefore seem to hold considerable promise as a framework for thinking about executive compensation. In line with the concept of paradox, the field of executive

remuneration and associated debates are riddled with seemingly contradictory but also seemingly defensible opposites, a state that stunts advancement.

■ **The overall paradox in executive pay**

As has already been noted, in general, there exists considerable tension between rationales for the status quo, which tend to stem from economic theories and statistical support, and pressure for change, based largely on perceived social imperatives. Perhaps herein lies the first of the major areas of paradox in executive pay. Especially if one accepts a socially informed moral opposition to large pay gaps and mechanisms of executive compensation, the paradox lies in a seeming inability to defuse the economic arguments underlying current executive pay.

There may be more specific paradoxical elements within the field of executive pay. Smith and Lewis (2011) create a taxonomy of different arenas in and through which organisational paradoxes may manifest. Included here are the broad areas of organising, learning, belonging and performing paradoxes. Chapter 6 argues that the current typical state of executive remuneration may create paradoxes in each of these, as discussed in the following sections.

■ **Performing paradoxes in the executive pay debate**

Performing paradoxes, according to Smith and Lewis (2011:384), 'stem from the plurality of stakeholders and result in competing strategies and goals. Tensions surface between the differing, and often conflicting, demands of varied internal and external stakeholders.' Smith and Lewis mention tensions such as a global versus a local or a social versus a financial focus.

Within executive pay, we see interesting tensions drawn by the different theories espoused. As has been noted, tournament theory places little or no focus on the performance of the winner, focussing instead on the effect of the enormous executive pay on the presumed wide-spread performance of those competing. A tournament-type view would place the incentive on the executive – once in power – simply to remain employed as long as possible to maximise his or her total salary. This would seem immediately paradoxical as most other theories focus on the performance of the executive and espouse the centrality of managerial leadership to organisational success.

This might not be seen as paradoxical if adequate use is made within executive pay in order to incentivise performance well. However, a plethora of sources point to a variety of problematic issues in this regard.

Firstly, historically, the link between executive pay and organisational performance has been weak. As has already been noted, this state of affairs existed until the 1990s when studies such as Jensen and Murphy (1990b) led the way for corporate-governance reforms to increase the extent to which executive pay was incentivised. Having said this, many commentators argue that organisational performance remains decoupled from executive pay, and it is frequently argued that large pay-outs occur despite failing performance (e.g. Pratley 2015).

Short-term incentives based on immediate performance targets have therefore increased in magnitude within executive salaries. However, these are fraught with problems. In many cases, the type of short-term targets offered for bonuses are part of a much longer-term strategy. As has often been noted, short-term incentives may create a

temptation for executives to manipulate shorter-term results at the expense of long-term outcomes (e.g. CIPD 2015a). An example is short-term profit manipulation where executives could slash crucial spending on longer-term needs (like research and development or the size of the workforce) or the like to 'make the book look right' for their bonuses. This is especially problematic since the job tenure of many executives is relatively short, typically measured in just a few years compared to the far longer lifespan of many projects. More rapacious executives are essentially incentivised to sacrifice the future to the present in order to maximise their shorter-term incentives.

However, it is precisely the preceding issue of short-termism that has led organisations to incorporate long-term incentives as a dual feature of executive pay. As noted earlier in Chapter 6, this is usually achieved via share awards to executives or stock options, which may be exercised within given rules (e.g. that the shares not be sold for a certain number of years). However, various tensions that may create paradox are at work in this thinking:

- Share price is related to organisational factors that are not necessarily related to performance. Perhaps the most perfidious example of this is the size effect: Larger companies tend to command larger share prices as well as coincidentally higher executive pay. This has led to the well-known drive by executives to initiate mergers and acquisitions, a corporate path that leads to several inter-related effects: (a) a relatively rapid way to increase firm size, (b) the noted inflation in share prices and therefore the value of executive share pay-outs, (c) the illusion of productive activity and change, which satisfies stakeholders of executive effort, (d) the ability to 'rewrite the slate': mergers and acquisitions effectively destroy the old

organisation and confound any knowledge of what was previously expected of the executives, and instead, a whole new organisation must be negotiated and new rules and norms established (e.g. Bodolica & Spraggon 2015; Girma, Thompson & Wright 2006). Typically, this takes a generation of executives at least, by which time the departed cohort have cashed in their shares and profited off the sheer growth effect. Whether the merger or acquisition has in fact added value is often a much longer-term matter that is in the hands of future generations of executives.

- Executives may not control the share price of businesses over time as much as remuneration committees assume that they do. This is especially problematic in times of deep national, industry or stock-market stress or upswings where changes in the firm's share price may be more influenced by external than internal factors. This knowledge inherently undermines share-based incentives. If executives are allowed to exercise shares over a long period of time, the natural fluctuation of share markets suggests that they may find fortuitous periods during which to take advantage of upswings. Should very narrow periods or exercise be imposed, the incentive effect may be undermined by negative fluctuations in a manner similar to share-ownership schemes for employees.
- Paradoxically, stock markets can be amenable to very short-term manipulations through corporate communications or spending decisions, which can allow senior executives to affect outcomes within a relatively narrow band but which has negative longer-term effects. For example, research has recently shown that executives also tend to slash research and development spending in the year before their stock options vest (McGregor 2014), leading to longer-term degradation in innovation.

- Even relatively long-term incentives are often designed for the tenure of the average executive, not necessarily for the lifespan of the projects in which they are involved (e.g. CIPD 2015a).

Ultimately, the ability of executive pay to be truly linked to performance remains under scrutiny. Despite the array of options, executives' biggest incentive may remain to do enough to stay in office where the accrual of pay over time will surely grant them substantial overall pay even under fluctuating performance conditions.

■ Belonging paradoxes in the executive pay debate

Smith and Lewis (2011) define 'belonging' paradoxes as those which:

[A]rise between the individual and the collective, as individuals and groups seek both homogeneity and distinction. At the firm level, opposing yet coexisting roles, membership and values highlight tensions of belonging. (p. 383)

Both tournament and principal-agent theories, cited earlier as some of the foundational economic theories used by the proponents of the status quo in executive pay, provide fuel for a belonging paradox. Here one may locate one of the most damaging effects of excessive and oblique executive pay, namely its polarising effects. When we unpack tournament and principal-agent theories, we note that they exist precisely to re-identify individuals who have become executives with a 'super group' that: (a) has won the tournament and is now differentiated from those who have not, and (b) is to be forevermore 'aligned' (in the parlance of principal-agent theory) with organisational owners rather than with subordinates as executives will probably come to sit on boards or interact intensely with ownership structures in other ways.

One can see an entire system of the re-identification and demarcation of individuals in tournament theory, the fundamental notion of which separates ‘winners’ from ‘losers’ and ‘contenders’ from ‘non-contenders’. Executives are demarcated from others in many overt and visual ways (e.g. Davison 2010), including their *physical or spatial surroundings*, such as the award of luxurious offices; *attire*, where the executive suit parallels the green jacket of the USA Masters winner or the yellow jacket of the Tour de France; and *interpersonal elements*, such as the demarcation of executive dining facilities or inclusion into exclusive ‘clubs’ such as the Institute of Directors in South Africa. Pay systems and levels stand as the ultimate identifier in this system of differentiation. Not only is executive pay so remarkably higher than others, it is also so very different, characterised by complex incentives that – as was discussed earlier – elevates these pay packages to the realm of corporate finance and effectively obscures their meaning behind layers of complex financial concepts that seem impenetrable to the ‘uninitiated’. Then there are the perquisites, manifest symbol of difference, power and prestige.

The belonging paradox in this sort of systemic demarcation lies in the stark contrast with the intent of many other efforts to build organisational solidarity, co-identity and mutual engagement. Whilst organisations may differ in the extent to which they strive for solidarity as a part of their organisational cultures, it might be argued that the modern zeitgeist in many societies tends towards a reduction in power distance. In South Africa, it has long been argued that ‘African’ management does and should entail elements such as a sense of *ubuntu* ([human kindness] - a collective and communal sense of solidarity and mutual experience) although lived experience of such management styles may differ markedly (Karsten & Illa 2005; Lutz 2009; Mangaliso 2001). Already, this is

undermined by the apartheid-era legacy that many lower-level workers in South African settings may identify more with unions and other extra-organisational bodies – such as political parties – than with their own organisations, which historically were seen as instruments of the apartheid state. Further forces such as employment equity and Black Economic Empowerment regulation seek to break down the traditional executive enclave, dominated by white males, and seek the rapid inclusion of previously excluded individuals (notably black and female people) in actual executive groups or the ‘pipeline’ that leads there. Finally, we have already seen that broader social imperatives generally oppose the sense of separation between the wealthy few and the many poor: In an era where organisations are increasingly seen as the only feasible answer to general social ills such as unemployment, the expectation arises that even executives must see themselves as ‘belonging’ to the broader community. This brings about the exceptionally unflattering statistic seen earlier, comparing executive pay to the average unemployed person on a government grant, a ratio not found elsewhere and one that arises precisely from the belief that organisations belong to the wider social fabric.

Executive pay as it currently stands may therefore be seen as a particularly grotesque reminder of the fact that executives and those below them, never mind the unemployed, will never be seen as the same in either treatment or relative merit.

Paradoxically, the biggest ‘belonging’ issue when the elite is separated to this extent is that the organisation itself becomes identified as the mechanism of privilege – in essence, executives are often seen *as* the organisation. Instead of exorbitant executive privilege effecting a separation of elites from the rest of the

organisation, the real effect is to alienate non-executive individuals not only from their executives but from the entire organisation itself, which has become the agent and conduit of separation.

Regardless of the economic arguments for the current methods behind executive pay, it therefore surely cannot be argued that the pay regime facilitates feelings of organisational or social solidarity.

■ Organising paradoxes in the executive pay debate

Smith and Lewis (2011:383–384) suggest that organising paradoxes ‘surface as complex systems create competing designs and processes to achieve a desired outcome. These include tensions between collaboration and competition, empowerment and direction, or routine and change.’ Lewis (2000:767) also cites tensions within systems that simultaneously seek to foster control and flexibility.

It might be argued that the economic bases upholding the current executive pay systems are organisationally paradoxical. On the one hand, tournament-based pay is set up to create rivalry for higher pay levels, and on the other hand, organisations are increasingly designed for collaboration and teamwork. Even within executive levels, inter-executive tournaments for the CEO position are supposed to heighten rivalry. The Michael Crichton novel and film *Disclosure* with Michael Douglas and Demi Moore display the types of internecine corporate rivalry that can ensue under such conditions with operational breakdowns occurring as a result of interpersonal interference and even sabotage.

Whether such unhealthy rivalry is common or not, the idea of creating deliberate tournaments would seem less than concordant

with modern trends towards work interdependence, solidarity and teamwork.

■ Learning paradoxes in the executive pay debate

As proposed by Smith and Lewis (2011):

[L]earning paradoxes surface as dynamic systems change, renew, and innovate. These efforts involve building upon, as well as destroying, the past to create the future. Such tensions reflect the nature and pace of engaging new ideas, including tensions between radical and incremental innovation or episodic and continuous change. (p. 383)

Perhaps, the area of learning paradoxes is the most difficult when it comes to seeing the link to executive pay. However, perhaps the very different rates of change in organisational complexity – specifically the difficulties of leading modern organisations – as juxtaposed with the downward pressure on executive pay presents such a paradox. It is in this present era that organisational leadership has become exponentially more difficult for a plethora of reasons, including exponential growth in applicable technology and associated technological threats, rapid expansion in globalisation, rampant regulation, unprecedented workforce expectations and increasing social pressure. Under such conditions, it may seem paradoxical on behalf of opponents of the status quo to demand caps on remuneration or the like. Having said this, increasing complexity may call for other changes than capping pay.

Another area here may be that of management fads. Fads persist for periods that are contemporaneous with executive tenure, and adherence to them can lend an executive the veneer of high performance (e.g. Gibson & Tesone 2001). The learning journey of the firm regarding the advisability of the fad typically lasts longer than the

tenure of many executives, allowing them to be paid for the execution of a bad and – by virtue of being a fad – uncompetitive idea.

■ **‘Managing’ the paradoxes of executive pay**

Viewing executive pay as a paradox may help to deliver fresh ways to move forward in the debate. This section first reviews some of the solutions that have been presented as modern-day managerial responses to the tensions within executive pay. I argue that these are to some extent stale options as they do not address the fundamentally paradoxical nature of the issue. Thereafter, I frame possible solutions embedded within the types of options put forward by Lewis (2000) and Smith and Lewis (2011).

■ **Contemporary solutions**

There have been a few predominant methods that are dominating managerial and social responses to perceived issues regarding executive pay.

The first is to seek to narrow the wage gap to some socially acceptable number by lowering executive pay by some sensible amount. This has been considered for banking executives by countries like Switzerland (although the referendum on the issue failed) and Israel. Some companies such as Whole Foods have also imposed such caps on themselves although Huhman (2015) notes that their cap has more than doubled from 8:1 to 19:1 as the company has grown.

This approach seems fraught with difficulties. The formula for setting a cap would seem arbitrary or contrived at best, given the complexities involved. The approach potentially offers all the

negative effects predicted by the economic theories, from loss of incentive to inability to attract and retain the best talent. It may assuage social condemnation to some extent, but there is no well-tested level for such action: Even halving or quartering current levels of executive pay may remain grotesque in the eye of the unemployed or minimum-wage South African. In essence, simply seeking to lower executive pay is not a solution to the paradox, rather it ignores the paradox and seeks blindly to reduce one side of the tension.

A second major class of options fall under the 'corporate governance' banner, which seeks to improve visibility of and control over executive pay by stakeholders as well as to link executive pay better to performance. For instance, in South Africa, many companies follow the 'King III' report on corporate-governance codes (some of which are required of JSE listed firms), including *inter alia* the following:

- The CEO and chairperson must be different people. The chairperson must be either independent or the organisation should identify a lead independent director, in essence a second chairperson.
- The chairperson should not be the chairperson of the remuneration committee but may be a member. The CEO may not be a member of the remuneration committee but may attend and must withdraw from discussions about his or her salary.
- The integrated report of the organisation should disclose each individual director's pay as well as that of the three most highly compensated employees. The report should also disclose the policy determining base remuneration, participation in incentive schemes, reasons for pay above medians, major ex-gratia payments, policies governing employment of executives and other matters.

- The board should submit an executive pay policy to shareholders and remunerate according to it.
- Shareholders should be able to cast a non-binding (i.e. advisory) vote on the organisation's pay policy (including share schemes).

These sorts of governance structures are designed to separate executive, owner and board power, and they allow for disclosure that is intended to ensure that excessive practices are at least made visible. However, no firm in South Africa is obliged to abide by the entirety of the King codes with only JSE-listed firms obliged to follow a subset. In addition, it might easily be argued that these codes only legitimise executive pay as it currently stands and have little power to address the types of paradox identified so far. This is especially so when boards are primarily composed of previous or current executives within the networks of traditional organisational power and practices.

■ 'Solutions' for addressing paradox

Lewis (2000) suggests three major possibilities for addressing the paradox, namely *acceptance*, *confrontation* and *transcendence*. Smith and Lewis (2011) retain acceptance as a major step but refine the confrontation and transcendence possibilities into what they term *paradoxical resolution*, involving iterative steps of splitting (choosing one side of the tension at a time) and *integration* (learning to integrate or transcend where elements of both sides of the tension are explored).

In all of these suggested solutions, the dual tension of the paradox is simultaneously addressed by participants, and some way is found to move beyond the negative effects of reinforcing defensive cycles. I discuss each next.

□ Acceptance

Lewis and Smith (2011) describe acceptance as the ability to think paradoxically, essentially to accept the relative tensions of the paradox and embrace their dual existence. They cite Smith and Berg (1987:215), claiming that ‘by immersing oneself in the opposing forces, it becomes possible to discover the link between them, the framework that gives meaning to the apparent contradictions in the experience.’

How might actors immerse themselves in the paradoxical extremes? Firstly, dealing with non-executives looking in from the outside, current trends towards disclosure of executive pay levels, pay ratios and structure as a preference of corporate reporting seem a step in this direction. Such disclosures may help, but I would argue that they may in fact hinder, merely acting to concretise and highlight the expected magnitude of the difference. The pay ratio is likely to be high under almost any circumstance, will differ for many reasons such as firm size and is not the whole picture.

Various suggestions have been made for augmenting corporate disclosures that seem sensible. One such view is to reveal the percentage of the firm’s wage bill spent on executives rather than the pay gap. This will presumably scale the issue to firm size whilst maintaining some perspective regarding the relative contribution (e.g. Redelinghuys 2013). Another constructive option may be to abandon year-on-year reporting of pay gaps – which have the disadvantage of highlighting once-off bonus or share payments which may stem from years of work – and replace these with five-year moving averages or the like, which may provide a smoother view.

However, the real issue underlying executives’ pay is their contribution. Is it therefore possible to give non-executives a view of

the work senior executives do? Some possibilities in this direction may include:

- Surely in the age of extensive documentary production and relatively catholic television-viewership tastes, executives could arrange to reveal the types of work and extent of effort they undertake to earn their salaries through recorded and edited media, available to all, and giving a human as well as technical view of their contributions and experiences? This is already the case for many more celebrity-like executives, who are displayed in extensively read biographies and towards whom the public seems more inclined to warm. Of course, media has a substantial potential for manipulation as a result of which wise use of such a technique would be to allow a fair amount of journalistic independence in the making of the film without jeopardising organisational-proprietary knowledge.
- Firms could adopt the stance of some global firms that allow workers representation or at least attendance of certain key management events. At one extreme is the stance of some firms in countries like Germany that allow prevalent unions board representation or perhaps worker representation on only the remuneration committee (e.g. see Pratley 2015). However, in a highly adversarial context, which does describe much of South Africa's economy, this may not be a feasible first step for many firms. Nevertheless, other possibilities may exist for giving workers a view of executive-level decisions and skill levels such as discussing selected key decisions at broad meetings, releasing broader operational information and using teamwork more effectively to place decision-making further down and demonstrate complexities.

What about the assimilation of the lower end of the pay or social-wealth spectrum? Some initiatives have already been made such as the

‘702 CEO Sleepout’ in which South African CEOs recently spent a winter night sleeping on a street pavement in Sandton to raise money for homeless people and to experience the lot of those forced into such living conditions on a daily basis. This initiative was criticised by some for its token manner without any systemic change initiative, and it was labelled ‘poverty pornography’. However, within firms, there would seem to be better scope for familiarising the executives with their lowest-paid colleagues. Perhaps one option could be for policies to include one month in which each executive is paid the wage of the lowest-paid worker in the firm, with other months adjusting. Another might be for lowest paid workers to submit a range of monthly budgets at the time of salary reviews, allowing those who set compensation to consider the real-life experience of expenditure.

Lewis and Smith (2011) suggest that three elements may allow for acceptance of the paradox, namely individuals used to cognitive and behavioural complexity, individuals possessing emotional equanimity and institutions replete with dynamic capabilities, that is, the ability of organisational process, structures and systems to adapt to change and uncertainty. Surely the people and organisations of South Africa, immersed in turmoil and change for decades so that uncertainty and paradox seem part of their fabric, are ideally placed to adapt to the types of paradox involved in executive pay?

It is possible that acceptance is the ultimate positive end-point of this debate without recourse to further development. As noted by one reviewer to Chapter 6:

According to Kierkegaard, one must not think ill of the paradox ... and this is where a problem arises; the very nature of paradox is that it remains unresolved i.e. the ultimate paradox of thought: to want to discover something that thought itself cannot think. (n.p.)

This is perhaps an extreme view, and most critical management theorists and activists would hope for greater praxis, as discussed next.

■ Paradoxical resolution through splitting and integration

Smith and Lewis (2011) propose *resolution* as a process that might be entered into after acceptance. Following Poole and Van de Ven (1989), they propose a dynamic equilibrium model which involves the following (Smith & Lewis 2011):

[P]urposeful iterations between alternatives in order to ensure simultaneous attention to them over time. Doing so involves consistent inconsistency as managers frequently and dynamically shift decisions. Actors therefore make choices in the short term while remaining acutely aware of accepting contradiction in the long term. (p. 392)

How would such a strategy look in the context of executive pay? One could imagine a period in which executive pay is frozen, and attention is exclusively paid to raising minimum wages somewhat or improving the lot of lowest-level workers in other meaningful ways such as substantial personal development (training or the like). The common human desire to have one's issue addressed seriously and without competition for attention would be satisfied in this way, and gains may be made. Thereafter, attention could once again be placed on the structures of executive pay, after which the cycle repeats. Integration is sought as small changes are made in each iteration, but increasing cognisance may arise regarding the possibility of the co-existence of policies. For instance, it took major social unrest and violence to force the Lonmin platinum mine to substantially raise the minimum wage of workers. The more mature iterative process of splitting and integration may have allowed the mine to reach the same conclusion without substantial issues. Ultimately, the

long-standing claim that such wages were economically unfeasible for the mine seems now false in the light of the forced changes of history. Splitting and integration allow a careful but equally balanced view of both sides, accumulated over time. Where the issue is economic resources, as it probably always is when talking about salaries, Smith and Lewis (2011) note how an acceptance and resolution mind-set may change out a short-term way of thinking:

[V]iewing decisions as situated in the long term may reduce conflict over scarce resources because managers recognize that any choice is temporary, likely to change in the future because both dualities are vital to propagate long run success. Acceptance can further involve viewing resources as abundant rather than scarce. Those with an abundance orientation assume that resources are adequate and that people attend to resources by seeking affirmative possibilities and endless potential. (p. 392)

■ Some possibilities for resolution

Ultimately, aside from the general policies of acceptance (building awareness of both sides of the paradox) and resolution (splitting and integration to address both sides), I argue in Chapter 6 that the major paradoxes of executive pay are principally solvable through a few major initiatives:

- Ultimately, finding ways to raise minimum wages is often seen as a key step. There is likely to be a major difference between the stance of employees living at or even below the bread line in South Africa and those raised above it. Although minimum-wage workers worldwide who are far better paid also focus on the wage gap with displeasure, the truth in South Africa is that much goodwill can be gained by executives without lowering their own packages dramatically if they were to improve their minima. This may go hand-in-hand with

initiatives to upskill the workforce and organisation towards a more '4th industrial revolution' paradigm. However, as noted by a reviewer of Chapter 6. 'Therein lies a contradiction since minimum pay would not necessarily address high pay particularly when drivers for high pay are ineffectively unaddressed.'

- The prevalence of tournament-based pay thinking would seem to create more paradox than benefit. Boards could consider smoothing the progression of pay through the ranks of progression towards executive, rendering it a more linear progression. This could widen the benefit of organisational wealth and reward more people in the middle levels, from which, research finds, true innovation stems. Very large pay-outs for executives could then be deferred until retirement rather than entry, giving incentive to provide long-term and ongoing value to the organisation.
- The drive for pay for performance should probably be tempered. It is likely to lead to more short termism or risk than seems desirable, and long-term incentives become too complex and uncertain for rational use, leading to frequent complaints of executive cash-ins during bad times. Instead, executives should be held to high performance standards, and they should effectively not be allowed to continue under conditions of poor performance.
- A radical proposal is to remove share-based incentives entirely from executive pay. These payments are the most obscure, often the biggest, the most complex in structure and all too often determined more by the fickle swings in stock markets rather than firm performance. Failing such a radical move, executives should be constrained from exercising more than a given value of share blocks in any given period. It is unbelievable payments like that for Whitey Basson (who in 2011 cashed in share options

accumulated over decades for a value of R594.5m) that give rise to the perception of excesses in executive pay. Had these options been exercised over time, the magnitude of the pay-outs may have seemed less extreme in comparison to the average or lowest-paid workers to whom Basson was immediately compared.

However, even these attempts at resolution would seem to be incremental rather than radical. As noted by a reviewer to Chapter 6, such endeavours could in fact destabilise the system they are trying to redeem, for instance through causing widespread job losses due to high wage bills caused by minimum-wage increases far above competitor firms on the global scale.

Sustainable solutions are required. Perhaps one possibility in the case of certain firms is worker-owned firms (for example, where Black Economic Empowerment Programs over time are reconfigured to share capital amongst broad worker bases rather than concentrating it in the hands of a few). In such scenarios, executives could receive appropriate pay – whatever that would mean in the light of performance, attraction and retention – but ownership of capital could assist workers in not only reaping the rewards (dividends) of engaged management but ensuring worker activism in the balance of the executive-pay tension.

■ Conclusion

Executive pay has endured as one of the most conspicuous issues in the world of business, notably within severely unequal and factitious economies such as South Africa. The sheer quanta of the pay of executives, coupled with the complexity and obfuscation inherent within their design, has led to social unease and even unrest. In proposing a

paradox view, Chapter 6 proposes a way to approach what has effectively become a deadlocked situation with executive pay continuing to balloon on the back of economic rationales peddled by friendly boards and complicit shareholders whilst minimum wages and unemployment continue to bedevil the majority of society. Giving credence to both sides and considering the transcendence offered by a paradox approach may provide new insights and, hopefully, constructive change.

■ Chapter 6: Summary

Chapter 6 addresses executive pay in South Africa. It reviews the rationale and critique of the quanta and mechanisms of executive pay and embeds the general debate within the fragile social structures of South African society. Executive pay is viewed as an organisational paradox, using the frameworks of Lewis (2000) and Smith and Lewis (2011) to pit mounting social disapproval and other issues against seeming economic imperatives that have yet to give way. Executive pay also engenders other types of paradox in the performance, organisation, belonging and learning spheres of organisations. Possible additional suggestions for improvement are suggested, incorporating acceptance and paradoxical resolution through iterative splitting and integration mechanisms.

Is it worthwhile pursuing critical management studies in South Africa?

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Introduction

This research aims to ascertain the current level of familiarity with critical management studies amongst South African business-management academics. Furthermore, Chapter 7 also investigates business-management academics' opinion concerning the current climate within the field of business management (and related disciplines) as an academic domain. Traditionally and historically, a positivist tradition with associated quantitative techniques and methods seems to have typified the scholarly endeavour of business

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management in South Africa. However, in recent times, it has become apparent through conversations with peers that there is a movement toward exploring different research traditions and alternate research methods and techniques.

This, together with my personal journey of inquiry that has directed me to critical management studies (CMS), has prompted the focus on the current climate in the academic domain of business management in South Africa. As CMS is a relatively new movement of thought, it begs the question of how familiar South African business-management scholars are with it and how susceptible the academic community would be to a more formalised pursuit of CMS, given the current climate within this domain.

It needs to be stressed that Chapter 7 is not necessarily presented in a style that CMS scholars are familiar with, nor is it presented in a style normally associated with ‘mainstream’ scholarly work in management. This is intentional as it represents where I often find myself. I view myself as someone who is in the process of migrating from the mainstream to more of a critical position within the broader discipline of business management. I find the possibilities of CMS alluring and provocative, but I often battle to move away from the comfort zone presented by more ‘mainstream’ methodologies as that is the basis of my formal education and much of my experience. The style of Chapter 7 is therefore indicative of this migration towards critical scholarship.

■ Literature review

In this literary overview, I expand on the phenomenon of the so-called ‘paradigm wars’. Thereafter, this methodological tension will be

considered within the South African context. The literature review will conclude by examining the effect of adding a third paradigm – that of CMS – to business management as a field of academic inquiry.

■ The paradigm wars and associated aftermath

The so-called paradigm wars emerged in the 1980s due to the apparent shortcomings of positivist methodologies to deal with the demands of culture-orientated research in not only business management and related disciplines but in all social sciences (Buchanan & Bryman 2007; Denison 1996; Terrell 2012; Waite 2002). Scholars concerned with culture-orientated business-management research pointed out that the basic search for universal assumptions and principles to govern the activity of business management is incongruent with the context-specific nature of culture-orientated research. As a result, these scholars turned to methodologies proposed by interpretivists as a guiding ontological grounding for their work (Johnson & Onwuegbuzie 2004; Oakley 1999; Terrell 2012).

The ensuing jockeying for position is not always viewed as constructive in working towards greater commonality of purpose amongst business-management academics (Denison 1996). Inevitably, the paradigm wars degenerated into proponents of one camp attempting to discredit proponents of the opposing camp in an effort to gain heightened legitimacy within the scholarly space (Mingers 2004). This has resulted in the creation of positivist and interpretive orthodoxies that stand juxtaposed to each other and has caused a contrast between these stances that is often more ostensible than real (Denzin 2010; Neuman 2006).

The emphasis on proving the legitimacy of one camp over and often at the expense of, the other has left very little room for claims of legitimacy

from scholars who attempt to combine the two perspectives into a so-called mixed-methods paradigm (Denzin 2010; Flick 2002; Guba & Lincoln 2005). The creation of the methodological orthodoxies mentioned above has resulted in claims from both camps that combining these two paradigms is not possible, given their contrasting ontological positions (Denison 1996). The paradigm wars have also resulted in much greater emphasis on the methodological correctness of the chosen research method, which has diverted necessary energy away from providing sorely-needed rich and full descriptions of the object or phenomenon under investigation and have reduced many research outputs to the mundane and obvious (Oakley 1999; Waite 2002).

Some authors point out that it does appear as though the paradigm wars have abated in recent times (Denzin 2010; Mingers 2004; Shaffer & Serlin 2004; Terrell 2012). Methodological fundamentalism seems to have now been replaced by methodological tolerance where proponents of both camps seem to recognise the legitimacy of the other under certain conditions (Mingers 2004). Also, new paradigms such as postmodernism and critical theory have also entered the management discourse, fuelled in part by an increased trend to explore these peripheral traditions from within the humanities (Waite 2002).

Thus, although the paradigm wars seem to have ceased for the most part, the academic discipline of business management (and associated areas of inquiry) appears to have now entered a phase where the domain is ontologically and methodologically more fragmented than in the past (Buchanan & Bryman 2007). The challenge that is now evident emanates from one of the consequences of the paradigm wars mentioned above. This entails the eradication of juxtapositions between the positivist and interpretive traditions in favour of a more cooperative, multi-paradigmatic stance where

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cooperation between paradigms is sought and encouraged in an effort to address not only issues crucial to business but also issues crucial to those groupings affected by business (Cameron & Miller 2007; Shaffer & Serlin 2004; Teshakkori & Teddlie 2003).

■ **Apparent methodological tension in the South African context**

Drawing from the preceding discussion, I now turn to the South African context and try to establish the state of affairs in the South African context as far as these paradigm wars are concerned. It must be stressed that this section is based on my own experience as an academic, having operated within the business-management space for more than 20 years. Currently, I am an associate professor at the University of Johannesburg as well as the managing editor of a management journal accredited by the South African Department of Higher Education and Training (DHET). My opinions have been shaped by continuous conversation with fellow academic from all over South Africa as well as my experience gained during my seven-year tenure as journal editor.

In my opinion, the paradigm wars seem to have hit local shores slightly later than the 1980s as literature purports the situation to have been in (especially) the USA and Europe. Drawing from experiences as a young academic, business-management research in the 1990s was associated purely with quantitative methodologies. Only toward the end of the 1990s did qualitative research start to enter the discourse on how research should, and could, be conducted in the academic domain of business management. I have always been quite attentive to this debate as my formal education has not exclusively been within the realm of so-called 'economic and

management sciences'. Although I completed a BCom, my postgraduate journey commenced down the path of the humanities, completing both a BA Hons and MA by the mid-1990s. My formal training in research methodology encompassed both quantitative and qualitative traditions, and my personal affinity lay with qualitative research. Indeed, my MA study was a qualitative one. After accepting a position as lecturer in business management, I continued to pursue an MCom, and I soon realised that an appreciation for the qualitative tradition did not exist in this field, and resultantly, my M.Com dissertation entailed a quantitative study.

Yet, despite this scenario, it must be emphasised that this situation, in my opinion at least, had changed by 2010, with a much greater appreciation in the academic domain of business management for the interpretive paradigm and associated qualitative methodologies. However, despite this increased appreciation for qualitative work, very little capacity had been created for qualitative scholarship. An exception seems to be in the field of human resources management where qualitative scholarship was on the increase as is evident from manuscript submissions to the journal I edit. The reason for the increase is that this journal had been gaining a reputation as a journal that sought to promote interpretive and qualitative research around that time.

As we now enter the latter half of the 2010s, it is apparent that the methodological tolerance eluded to in the previous section still abounds. However, it would seem as though an urgency exists to try and find some basis of cohesion for these two traditions to co-exist within the academic community rather than oppose each other. Although still in the minority, it is pleasing to see that the number of qualitative submissions at the journal I edit is slowly increasing. As many of these submissions are coming from traditionally quantitative

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scholars who are not yet sufficiently versed in the qualitative tradition, the rejection rate of these submissions is unfortunately very high. Be that as it may, this movement is evident of a willingness on the part of some South African scholars to create capacity in the realm of interpretive inquiry employing qualitative methods.

■ Adding CMS to the mix

My own scholarly journey has, as already mentioned, not been down the 'straight and narrow' commerce path. I have taken on postgraduate studies in the humanities, and after obtaining my PhD, I have embarked on three years of study in philosophy. During this time, my research interest also started shifting toward issues of morality in business, which found application in studies relating to corporate social responsibility and business ethics. My scholarly endeavour into moral issues surrounding business exposed me to the tradition of CMS, which has now become my chosen area of specialisation.

The discussion now turns to a brief introduction to CMS and its central tenets before venturing into the possibilities for CMS in the South African scholarly realm of business management and associated disciplines. This section will conclude by reflecting on the conditions necessary for CMS to gain a foothold within the academic domain of business management in South Africa.

■ A brief introduction to CMS

CMS is a relatively new development within the scholarly domain of business management. It is widely recognised that this movement assumed its identity and gained subsequent momentum with the seminal work of Alvesson and Willmott (1992; also see Grey 2004;

Learmonth 2007). However, it is also recognised that critical work relating to management and business practices did exist before Alvesson and Willmott's seminal work, especially in the body of knowledge dealing with labour-process theory (Anthony 1986; Clegg & Dunkerley 1977).

CMS draws upon perspectives such as neo-Marxism, labour-process theory, critical theory (most noticeably, Frankfurt School thinkers such as Habermas and Adorno), industrial sociology, post-structuralism and postcolonialism in an effort to direct critique against conventional business and management practice and knowledge creation (Alvesson, Bridgman & Willmott 2009; Dyer *et al.* 2014; Sulkowski 2013). It employs both non-empirical and empirical methodologies (exclusively qualitative) to incite radical re-evaluation and to encourage radical change where scholarship and practice exhibit the potential for exploitative practices or where the broader political-economic system renders those affected by the footprint of business powerless (Clegg, Dany & Grey 2011; Sulkowski 2013).

Drawing from its neo-Marxist influences, CMS challenges the potential for unequitable power relationships brought on by the dominant political-economic system, namely capitalism (Adler, Forbes & Willmott 2007). CMS scholars warn, for example, that the capitalist notion of wage labour exhibits vast potential for exploitative practices as inequitable relationships in bargaining power between forces of capital and labour render the notion of wage labour voluntary, a facade to subjugate the labour force.

CMS further posits that, through the global spread of capitalism and the mechanisms that support it (in the form of business organisations), the system has created institutions as well as institutionalised notions and practices to legitimise its success, often

at the expense of local, indigenous and alternative systems of political economy (Deetz 1995; Harding 2003; Jack & Westwood 2006; Sulkowski 2013). This has resulted in a proliferation of consulting firms, business or management faculties, business schools and publications (Stewart 2009). This legitimisation has, in turn, resulted in the establishment of an ideology of managerialism, which is largely rooted in the success of the scientific method in business management. Accordingly, the academic discipline of business management rests upon this ideology of managerialism and the associated notion of scientism responsible for generating knowledge in support of the claims that managerialism presents (Kimber 2001; Stewart 2009).

■ Central tenets of CMS

Fournier and Grey (2000) suggest three principles that are central to CMS as tradition of inquiry. Although these 'principles' have grown synonymous with CMS as a scholarly tradition (Grey & Willmott 2005), some of them are, in themselves, contentious issues within the CMS community (Alvesson *et al.* 2009). The endeavour here is to introduce these principles but not to elaborate on the accompanying pros and cons in too much detail.

The first of the principles suggested by Fournier and Grey (2000) is that of *denaturalisation*. If one recognises that, as stated above, the dominant political-economic system has entrenched institutionalised notions of its own legitimacy and that this institutionalisation is pervasive, then it would stand to reason that this institutionalisation is not challenged but taken for granted as 'the way things are'. However, this does not necessarily mean that such institutionalised notions are just, fair or even morally acceptable. The principle of denaturalisation challenges these notions, especially if they have

exploitative and morally questionable consequences. CMS, therefore, does not go along with the 'that's the way things are' or 'that's the way business goes' mind-set (Alvesson *et al.* 2009).

Secondly, Fournier and Grey (2000) suggest that CMS is a *reflexive* endeavour. In other words, it recognises that inquiry into management is advanced from the particular tradition to which its scholars ascribe and thus recognises the values which direct what is being researched as well as how it should be researched. CMS is sceptical of claims of universality and objectivity in management and posits that mainstream, positivist-oriented research in management exhibits weak (or even no) reflexivity. Reflexivity further implies that scholars and knowledge users should critically reflect upon the assumptions and routines upon which knowledge creation is based, irrespective of tradition, and must understand how culture, history and context influences knowledge generated through scholarly endeavour (Grey & Willmott 2005).

Fourier and Grey (2000) lastly suggest the principle of *anti-performativity*. This notion suggests that the outcome of the scholarly project in management should not necessarily further the enhancement of existing outcomes. The general yardstick against which new knowledge generated in management is evaluated is the practical value of such knowledge possesses, in other words, can such knowledge help make management a better process or practice. However, this approach means that the knowledge is still applied to further an ideology of managerialism. Anti-performativity suggests that new outcomes should be sought which do not necessarily fall within the parameters of mainstream managerialism. Anti-performativity is a contentious issue within the CMS community with strong arguments for and against it. However, as mainstream scholars point out there is no

alternative in terms of these outcomes. This lack of viable alternative, yet again, speaks to the pervasiveness of the institutionalisation of the managerialist ideology. Anti-performativity, as an ideal, thus seeks to propose an alternative to the ideology of managerialism. How ambitious a project this is and what the probability is of achieving such an outcome is open to debate (Spicer, Alvesson & Kärreman 2009).

CMS, it would seem, is a radical and ambitious project that challenges deeply entrenched views about how management and business should be approached, not only from a practice point of view but also from a scholarly perspective. It reminds strongly of Socrates's 'radical discourse' and the Kantian notion of 'the world appears to me through the questions I ask.' The guiding principle, it would seem, is first to try to break down these deeply entrenched views and thereafter to reconstruct a view of business and management which is able to shed light on issues and challenges for which current managerialism might not always have the answers (Hancock & Tyler 2004).

Possibilities for CMS in South Africa

Of course, there needs to be value in introducing or making pervasive an alternative tradition to the study of business management in a particular setting. Business management seems very much to be an applied discipline where the practical application of knowledge generated is sought. It would therefore be reasonable to enquire as to what the benefit could be, for scholars and practitioners alike, of nurturing an alternative scholarly tradition such as CMS?

In my opinion, the most logical area for CMS to focus on in the South African context would be in terms of reviving indigenous knowledge and wisdom and searching for areas of integration of such

wisdom into the management discourse. As a country that has been subject to more than 300 years of colonial subjugation and close to 50 years of apartheid rule, it is reasonable to posit that the local knowledge and wisdom of its people have been suppressed and have not been allowed to enter the 'mainstream' discourse, at least in the realm of business management as an academic discipline (Goldman 2013).

A simple look at 'South African' subject-matter textbooks in business management proves this point as these works are merely a collection of American or Western management principles which have been saturated with South African examples. The glaring flaw is that this literature is devoid of any uniquely South African knowledge, and at best, it only provides us with South African interpretations and applications of American or Western knowledge. This, in turn, reduces the educational endeavour in management to a mere perpetuation of the deeply entrenched institutionalised notions of managerialism.

I am of the opinion that CMS provides a lens through which South African knowledge and wisdom can actively be sought for the purpose of extracting South African perspectives on business management (Goldman, Nienaber & Pretorius 2015). The counter argument does exist that, if such knowledge did exist, it would have already been uncovered. However, I am not convinced by this argument. The agenda of managerialism is so firmly entrenched within the majority of scholars that the mere thought of a viable alternative cannot be conceived and is reduced to an exercise in futility. Yet, however romanticised it appears to be, it certainly needs to be attempted. If, through empirical inquiry, it appears that indigenous wisdom has nothing to offer to the discourse on business and management, then so be it. However, I would rather let scholarly inquiry prove this than allow ideological conviction to argue it.

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Certainly, the South African context abounds with other issues that CMS can latch on to. As a tradition that seems to uncover unjust business and managerial practices and which sensitises against the misuse of power stemming from the legitimisation of ideological stances, CMS can potentially contribute to the discourse on management and business in the South African context (Goldman 2013).

■ **Conditions necessary for CMS to gain momentum**

It would be fair to assume that a specific climate needs to be prevalent for a new or emergent academic tradition to establish a foothold and gain momentum within a given milieu. Thus, one needs to establish which conditions need to be prevalent for CMS to start occupying a sound position within the academic space of business management in South Africa.

Various authors (Bernstein 1976; Fournier & Grey 2000; Hassard & Parker 1993; Locke 1996; Willmott 1993) point to the fact that two systemic issues have created a climate where the emergence of CMS is possible. I briefly expound on these below:

- *The internal crisis of management:* Locke (1996) purports that American managerial practices have been (and still are) seen as the yardstick against which management in the West is measured. However, he also points out that, after 1970, American management has increasingly been criticised as ineffective in the face of international competition. This resulted in a rise in popularity of (specifically) Japanese and German management principles at the expense of American principles. This has resulted in a shift in emphasis away from the 'bureaucratic administrator' towards the manager as an almost mythical figure, possessing a blend of charisma

and codified rules transmitted through scientific training. This sanctification of the manager is also associated with more potential power and status centred in management, which has resulted in a fertile breeding ground for critical inquiry. Furthermore, the increased emphasis on looking for management wisdom further afield than only American management practices has resulted in a proliferation of management fads and fashions (fuelled, in part, by popular literature), which has made the vision of a stable, unified discipline not only more unrealised but (it would seem) unrealisable.

- *The role of positivism in social science:* The notion that social science should attempt to emulate the natural sciences in its methodologies and basic premises of aiming for the realisation of universally applicable principles has been a contentious issue at least since the 1950s (Winch 1958). Furthermore, Kuhn (1962) questioned the issue of objectivity in natural sciences, which marked a renewed interest in phenomenology and witnessed a fragmentation of social sciences into competing perspectives which marked the advent of the paradigm wars expounded upon earlier in this paper. Business management as an academic discipline has witnessed the gradual acceptance of non-positivist traditions, although still far in the minority. However, the basic premise is that a critical mass of scholars do exist for whom non-positivist traditions seem to be ontologically more attractive.

Given the nature of the academic discipline of business management (and related disciplines) as a social science, as much as it is an economic science, that operates in an increasingly fragmented epistemological domain and bearing in mind that the South African context is one that is heavily influenced by the legacy effects of both colonialism and apartheid, it would appear as though the climate in the academic domain of business management is susceptible for the introduction of CMS as an alternative tradition for the study of business management.

■ Methodology employed

From the literature review, it would seem that the academic domain of business management as a field of inquiry could be susceptible to the introduction of CMS as an alternative tradition of enquiry. In the rest of Chapter 7, I aim to employ empirical means to concretise this notion. Thus, the research question that the chapter endeavours to answer can be stated as follows: 'How susceptible is the academic domain of business management in South Africa to CMS?'

To answer this research question, the study aims to achieve the following:

- Assess the level of familiarity with CMS amongst South African business-management academics.
- Develop an understanding of the nature of the climate within the academic domain of business management with a view to introducing CMS as an alternate tradition for the study of business management.

As the aim of this study implies exploratory research, the study espoused an interpretive point of view, employing qualitative research methods. The research population comprised senior, full-time academics operating within the academic domain of business management and related disciplines at South African state-funded universities. Non-government funded higher-education institutions or private universities were not included in the study as these institutions are traditionally more focused on teaching than on research. 'Senior academics' refer to academics on the levels of senior lecturer, associate professor and full professor. The decision to focus on senior academics was borne from the relative newness of CMS. As it is not part of the mainstream thinking on business management, the probability is greater that senior, more experienced

academics would have come into contact with the notion of CMS. For purposes of this study, 'business management and related disciplines' refer to academic areas of inquiry where business management is the common denominator. This would therefore include areas such as business management, hospitality management, human resources management, knowledge management, marketing management, project management, strategic management, small-business management and entrepreneurship, supply-chain management and logistics, and tourism management. Thus, senior academics working in these areas in South Africa constituted the research population for this study.

As this research is exploratory and deals with peoples' familiarity with CMS as well as peoples' views on the climate within the discipline of business management, a qualitative-survey design was adopted. The study was envisaged to employ a two-staged data collection process, and each of these stages employed its own sampling procedure:

- *Stage one:* This stage involved a relatively simple qualitative survey of selected research subjects concerning their familiarity with the field of CMS. One hundred academics were sourced, 88 of whom were known to me. The remaining 12 were 'cold canvassed' to ensure a relatively even spread across institutions and related disciplines of management. Thus, the sample was selected on a judgmental basis.
- *Stage two:* Resultant from the first stage, a number of people would be selected from the initial sample of 100 to share their views on the current climate within the discipline of management and related disciplines in the form of either a semi-structured interview or a reflective essay. Participants were given the choice due to the fact that the sample is geographically dispersed. Furthermore, time

constraints and workload pressure could also prevent people from meeting with me for an interview. The exact number of people to be selected could not be established until the conclusion of stage one as this number would be dependent on the response rate in stage one and the nature of responses received. Ideally, I would have liked to approach in the vicinity of 30 people with a relative spread from those familiar with CMS to those not that familiar with it and those who have no knowledge of CMS at all. I decided that I would use a combination of judgmental and theoretical sampling techniques to select participants at the conclusion of stage one.

For stage one, research subjects were simply asked via email if they were familiar with critical theory in the academic inquiry into business and management as the purpose here was simply to establish level of familiarity with the concept. Stage one employed a more thorough soliciting of data from research participants. As the majority of people indicated that they would be writing a reflective essay, a briefing document was prepared outlining the aim of the research and stating four questions upon which participants had to reflect. These questions were also used as an interview guide for those participants who chose to conduct an interview. As stage two also wanted to include those unfamiliar and not so familiar with CMS, the questions were not CMS specific but rather sought to solicit opinions concerning the climate of business management as an academic discipline and opinions concerning non-positivist methods of inquiry.

Data analysis for this study also differed in the two stages outlined above. In stage one, a simple categorisation of responses were employed. Responses were categorised in three categories, namely those with no knowledge of CMS, those with a basic knowledge of CMS and those with more advanced knowledge of CMS.

The differentiator between basic knowledge and advanced knowledge was the level of engagement with CMS. Those responses that indicated formal schooling in CMS on post-graduate (masters or doctorate) level as well as those responses indicating research publications (journal articles or conference proceedings) within the CMS space were deemed as falling into the category of 'advanced level'. This categorisation resulted in a frequency distribution indicative of familiarity of South African management academics with CMS.

For stage two, the interviews and reflective essays would be analysed by employing qualitative content analysis. More specifically, the method of coding proposed by Creswell (2003) was followed, using the questions posed in the briefing document as a coding scheme. Creswell's (2003) process for conducting qualitative data analysis entails four steps, namely:

1. Organise and prepare data: Reflective essays have the advantage that the data is already transcribed. For those participants who opted to conduct an interview, the recorded data were transcribed onto Microsoft Word. The transcription was typed at the completion of each interview and not at the end of all of the interviews.
2. Read through all data: All transcripts were read to gain an overall understanding of the views of research participants. Data were classified and grouped according to the four questions posed by the briefing document.
3. Begin a detailed analysis with a coding process: In this step, the emphasis shifted from describing to classifying and interpreting. This is where the coding process took place, utilising the following procedure:
 - o Each cluster of data was viewed in turn, constantly searching for sub-themes that might arise from each of the four broad categories.

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- Sub-groups were scrutinised to see whether they could be viewed as a stand-alone theme or whether they could be collapsed into a stand-alone theme with other sub-themes.
 - Relationships between themes and sub-themes were then sought to develop a ‘big picture’ of the nature of the climate of the academic space of business management.
4. Use a coding process to generate a description for the case study: This step displays the generated data, based on the themes appearing as major findings of the study. This was performed by interpreting what the data uncovered. This interpretation was based on the understanding that was derived from the collected data.

■ Findings from the study

The qualitative survey for stage one was conducted between August and September 2015. During this period, some participants referred me to colleagues who they thought might be familiar with CMS. These referrals amounted to eight in total. I decided to include them in the sample as it became apparent very early on that very few people fell into the ‘advanced knowledge’ category. From the 108 academics targeted at 16 higher-education institutions, 88 responses (81.5% response rate) were received. The outcome of the initial categorisation can be seen in Table 3.

It became apparent that the ‘limited knowledge’ category needed to be divided into two categories as responses indicted a polarisation of responses here. On the one hand, some people had either heard of CMS or indicated in their responses that they did not know much about the topic. These responses were categorised as ‘restricted knowledge’ (see Table 4). On the other hand, there were responses that indicated that people had some knowledge, but they did not

TABLE 3: Initial categories.

Category	Total (<i>n</i>)	Relative frequency (%)
No knowledge	49	55.7
Limited knowledge	32	36.4
Advanced knowledge	7	7.9
Total [<i>N</i>]	88	

TABLE 4: The reworked categories.

The reworked categories	Total (<i>n</i>)	Relative frequency (%)
No knowledge	49	55.7
Restricted knowledge	18	20.5
Basic knowledge	14	15.9
Advanced knowledge	7	7.9
Total [<i>N</i>]	88	

profess to have an advanced level of knowledge about CMS. These responses were categorised as ‘basic knowledge’.

The qualitative survey for stage two ran from September 2015 to November 2015. From the responses of the qualitative survey in stage one, a target of 40 people were selected for stage two, of which:

- 7 people were from the ‘advanced knowledge’ category
- 16 were from the ‘restricted’ and ‘basic knowledge’ categories
- 17 people were from the ‘no knowledge category’.

Contact was established with all 40 research subjects. Four of these potential research subjects indicated that they were not willing to participate. Of the 36 remaining potential research subjects, data was eventually gathered from 21 research subjects. Of these 21 participants, semi-structured interviews were conducted with three people and self-reflective essays were gathered from the other 18. The research respondents emanate from 12 South African universities and universities of technology, with six senior lecturers (all with doctoral qualifications), six associate professors and nine full professors participating in the

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qualitative survey in stage two. In terms of familiarity with the concept of CMS, the group was constituted as follows:

- Four research subjects were from the 'advanced knowledge' category.
- Nine research subjects were from both the 'restricted' and 'basic knowledge' categories.
- Eight research subjects were from the 'no knowledge' category.

An attempt was made to apply coding to sentences, but it was soon realised that coding would be more expedient if applied to central ideas contained in multiple-sentence clusters. After initial coding, a total of 36 categories were identified in the data. Further passes through the data and scrutiny of the interrelationships between these categories resulted in the emergence of five themes central to understanding the prevailing climate in the South African academic domain of business management as well as the role CMS can fulfil in this area. Each of these five themes will now be presented and discussed in turn.

However, before I expound upon the themes, it is important to note that research participants, especially those who had no knowledge of CMS prior to being involved in this research, embarked upon some basic reading on CMS literature to be in a position to meaningfully contribute to the research. Nine of the research participants explicitly stated this in their feedback, and this included five research participants that were categorised in the 'no knowledge' category.

Theme 1: Paradigmatic dominance

The majority of the research subjects were very vocal in their view that the academic field of business management in South Africa is characterised by the distinct paradigmatic dominance of the positivist

tradition. A total of 11 of the research participants directly referred to positivism as the dominant research paradigm in business management in South Africa. Although the rest of the participants did not directly refer to positivism as the dominant paradigm, it was clear from the views expressed that they felt that quantitative methods dominated in the academic discipline of business management. Peripheral to the above, the sentiment was expressed that positivism cannot adequately address pressing challenges that are emerging in the domain of business management, specifically in South Africa. In this regard, participants cited that positivism cannot adequately address issues such as complexity, hyper change and the so-called 'dark side' of management. Only one of the research participants did not feel that quantitative methods stemming from a positivist paradigm dominated the business management discourse in South Africa. The following excerpts from interviews and self-reflective essays underscore these sentiments:

'Absolutely, we need to counter the dominant positivistic approach with qualitative and critical inquiry.' (P3)

'We are currently dealing with a paradigmatic dominance of empirical practice where there is little offered as an alternative.' (P13)

'I find the space, certainly from a KwaZulu-Natal perspective, overly positivist, both in the way we teach our students to the ways in which we conduct our research. There is a veneration of the "scientific" method over other methods and epistemologies.' (P14)

'This paradigm is however not the one that business-field academics and students are used to practice in South Africa. Here the emphasis is on positivistic studies of a quantitative nature.' (P16)

These views on the dominance of the positivist paradigm also lead research participants to cite issues associated with this perceived paradigmatic dominance. Firstly, they expressed the view that the

dominance of a particular paradigm leads to a situation where limited space is provided for alternative views and methodologies. The sentiment was expressed that positivism often fails to recognise its own limitations, and as such, it is oblivious to its own shortcomings, which in turn creates a situation where alternative views are frowned upon as being biased and unscientific. Seven of the research participants explicitly stated that a domain typified by such a paradigmatic dominance does not bode well as it stifles innovation of thought. They were of the view that different research paradigms should actively be promoted. Secondly, this apparent paradigmatic dominance has a marked effect on publication and publication possibilities. There was a strong sentiment amongst research subjects that most South African business-management journals were markedly positivist and that their editorial policies left very little leeway for alternative methodologies. The following annotations provide support to the findings provided above:

‘Most journals in South Africa are explicitly positivist in orientation.’ (P13)

‘Academics and students would require some form of acceptance if they are working in this domain as it is very difficult to get published in this field in South Africa.’ (P16)

‘It is difficult to publish qualitative work and virtually impossible to publish critical work in this country. Most journals simply do not cater for anything other than quantitative papers.’ (P21)

‘Management research tends to side-step complexity neatly by taking a positivistic stance, which then leads the dominant discourse of predict, exploit and control.’ (P14)

Theme 2: Diminishing returns prevalent in knowledge production

This theme seems to be a function of the paradigmatic dominance that seems to prevail within the scholarly business-management community.

Fifteen of the 21 research participants were quite vociferous in pointing out that research practices and methodologies prevalent in the domain of business management are delivering questionable results as far as the creation of new knowledge is concerned. There was a strong sentiment from research participants that this situation was, in part, due to a seemingly pervasive practice of producing research that seems statistically very impressive but tends to add little in the way of practical value beyond that which is self-evident. Thus, the critique here is that much of the business-management research output seems to be driven by a desire to impress the editors and reviewers of journals with intricate statistical analyses rather than by a desire to primarily produce research output that has great practical significance. The following quotations taken from interviews and self-reflective essays support these findings:

‘In my opinion, and based on my research, far too much research seems to be aimed at mindless production of statistical work, with conceptual works few and far between. Where is the brave conceptual engagement with ideas? Hiding behind a statistical barrage of work has perhaps become a norm; yet it is clear that the simple act of abstracting complex phenomena into linear relationships for statistical testing is in many instances suspect; and this is not typically acknowledged by authors.’ (P1)

‘We merely engage in theory validating research using questionnaires with no deep empirical or theoretical contribution to management studies and its allied disciplines.’ (P14)

‘Researchers in the field of marketing are mainly dominated by replication studies and no or limited new knowledge are therefore developed.’ (P6)

‘Increasingly papers are published dealing with highly sophisticated methods of empirical analysis. Yet the output forthcoming from these works is mostly boring and self-evident. Arguably it seems therefore that the field of management science is one where more and more is said of less and less.’ (P13)

Furthermore, there was also a strong sentiment amongst research participants that the dominant positivistic thinking and its associated quantitative methodologies lead to nothing more than a rehashing of

that which is already known. In other words, more and more research output is forthcoming that deals with the same issues over and over. The feeling is that this scenario leads to no innovation, creativity and rejuvenation of thought. The major critique forthcoming from research respondents here is that scholars continuously draw from the same literary base to formulate hypotheses, research propositions and research questions that are tested in different contexts. However, this literary base itself is not challenged and reshaped through constructive discourse, which gives rise to a scenario where the same things get done over and over again, so to speak. The table below provides excerpts from the interviews and reflective essays that support the findings presented above.

‘I question whether we are just really adding to the body of knowledge, or just contextualising what we already know.’ (P4)

‘In my perceptions, most research focuses on testing models empirically that adds very little to new knowledge’. (P19)

‘However, my perception is that we mostly “re-hash” existing theories and follow the correct steps to finish that PhD or the research without taking the real knowledge creation into account.’ (P8)

‘Surely there is a huge need for academics and students to perform qualitative and critical enquiry in management – it is important that both groups can think creatively, reflectively and critically.’ (P16)

Theme 3: Institutional pressures of publication

Again, this theme seems to stem directly from the sentiments prevalent in terms of knowledge production practices in the domain of business management in South Africa. The overwhelming sentiment echoed by research participants here was that, although many business-management academics would like to think that their research efforts

have vast practical application, the reality of the matter is that academics are driven by a need to publish rather than by a need to address societal issues insofar as issues of business management are concerned. Institutional pressure from universities as employers has resulted in academics chasing numbers of articles published and Department of Higher Education and Training (DHET) credits obtained in order to fulfil performance as contractually determined by key performance areas (KPA) rather than the societal and organisational utility of their research endeavours. This seems to be the epitome of the ‘publish or perish’ phenomenon. Some of the research participants – four in total – felt very strongly that this situation is resulting in no new and useful knowledge being produced in the broader domain of business management. The following quotations bear witness to these sentiments:

‘Although I enjoy the research projects I work on, I often ask myself how is my research adding value, am I solving the real issues at hand, contributing to business success, solving societies problems, in most cases my answer is *no* not really ... but I need outputs so I keep doing more or less the same research using the same methods.’ (P4)

‘The quantity of research output has increased but I have serious doubts as to the quality and practical impact of such research.’ (P14)

‘In my perception, most researchers think their research has practical application while that may not be the case in practice.’ (P15)

‘So we may develop academic research knowledge, but it is of no benefit to business.’ (P11)

‘In most instances, our research is not addressing industry challenges because as academics we are trying too hard to tick the boxes to get published. It is a publishing and funding game and not a humanitarian game of how we as academics in management can support or assist management and leaders in industry.’ (P10)

Some research participants also pointed out that a consequence of the scenario outlined above is that the chasm that already exists

between academia and industry just grows wider and wider as industry tends to view academic research as far too theoretical and not dealing with the issues relevant to industry. Although it is surely true that academia alone cannot be expected to bear the full brunt of the blame for this distance that exists between itself and industry, it is not doing itself any favours by pursuing a research agenda that is not aligned with the needs of business-management practice. The quotations below provide support for the abovementioned findings:

‘There are not really other platforms where researcher findings are shared to non-academics as most business-research conferences are attended by academics only.’ (P11)

‘In South Africa, the level of trust and cooperation between industry (and by the way, government too) is generally low. For example, I am not aware of many areas in the economic and management sciences where industry and government have actually commissioned major research to universities. Again, in spite of the need for board members, I am also not aware of many academics who are invited to sit on boards of companies. Also, it remains very difficult for researchers to be allowed access to companies to conduct meaningful research. Generally, researchers battle to get permission, making it very difficult to get good samples for publication in leading journals internationally. Without such robust research, it is hardly possible to contribute to addressing industry challenges.’ (P12)

‘Unfortunately not in the management sciences. We are all “playing the game” and writing for each other. As someone who spent more than a decade in industry, it is still shocking to me how irrelevant South African academics’ research (specifically in our discipline and probably many other in management sciences) is.’ (P9)

‘I don’t think we are publishing articles that are actually helping industry or that [*are*] of value to them. It’s not relevant to them. At the same time, academics are not always interested in the issues that are really of concern to industry. So somewhere we keep on missing each other.’ (P20)

Theme 4: Creating space for interpretive and critical inquiry

It is not surprising, based on the paradigmatic dominance perceived by research subjects, that there was a feeling that it would be in the best interest of business management as a field of academic enquiry to create space for alternative research paradigms and ways of thinking. In fact, all but one of the research participants expressed such sentiments. As it appeared that research participants felt that positivism and associated quantitative methodologies could not adequately address contemporary challenges within the domain of business management, they expressed the need for other paradigms to be encouraged and explored. The following sentiments were expressed by research subjects in support of this finding:

‘Yes, space is needed for CMS in South Africa, if not more so than in developed contexts.’ (P1)

‘There is definitively a need for critical management studies or critical theory in management studies. For example, small businesses fail, they have been failing for years and unless the system in which they operate and the assumptions held is changed radically or approached differently, they will continue to fail in the future.’ (P4)

‘Yes, there is a definite need and space for qualitative and critical inquiry in all areas of management, especially in my domain of marketing management as quantitative research are [*sic*] no longer sufficient to understand consumer behaviour.’ (P6)

‘There is definitely a need for qualitative and critical inquiry in management.’ (P12)

‘Yes, we definitely need a space for CMS in SA. It will elevate what we do, and in a sense, we are living in the perfect country to engage with this kind of research and adopt this kind of philosophical approach.’ (P14)

Specifically, research participants expounded that, although interpretive work had increased in the field of business management in South Africa, it still represents a minority that is struggling to gain a substantial

foothold in the business-management discourse in the country. They were also of the opinion that CMS, which is largely unfamiliar to South African business-management scholars, holds great potential to address some of the issues that the dominant, positivist paradigm could not adequately address, and it was felt that space should consciously be created for CMS within the academic domain of business management in South Africa. Research participants expressed particular views on how this could be established. These included the following:

- Incorporating CMS as part of the business-management syllabus, thereby creating awareness of this paradigm amongst students and also forcing academics to familiarise themselves with the basic principles of CMS.
- Securing a public platform for CMS at national scholarly business-management conferences such as the annual Southern Africa Institute for Management Scientists (SAIMS) conference. Participants expressed the explicit view that a 'showcase' session at this conference could help in establishing a critical mass of CMS scholars.
- South African management journals adapting their editorial policies to encourage more manuscript submissions of a critical orientation (as well as more interpretive submissions).

The following extracts from interviews and reflective essays support the abovementioned findings:

'Therefore, to answer the question, is there space for CMS in South Africa and in the syllabi of business managers? The answer is YES. This is a serious academic field of research because scholars in management face some challenges. The high demands of the AMCU trade union in platinum and gold mines in South Africa the last three years is probably a good example of extreme power play, something the modern business is not used to. The complexity of the social environment is brought to the surface, and the real power of different role players now really starts to sink in.' (P15)

'I think it would be a good idea to include CMS in our curriculum. The question is just, "where"? I do not think undergraduate is necessarily the right place for it, but I think we need it.' (P21)

'I would suggest that students should be exposed to any and all theories that would engage their minds and help them become serious thinkers.' (P18)

'However, the biggest challenge is to educate researchers and students on how to be critical and have critical thoughts.' (P4)

'I do believe, however, that South African management scientists should be made more aware of the idea of CMS, and opportunity for debates should be created (SAIMS) as the more exposure people have and the awareness that is created, the more people question and challenge the status quo.' (P4)

'Absolutely, but it will require an academic space – which is to say that at least one serious SA management journal and its editors must create such a space and invite debate within the area. Teaching academics and students the critical skills derived from the Marxist-structuralist tradition (inter-alia) will provide the means to better focus the lens of scrutiny on the key problems confronting SA.' (P13)

'Journal editors need to understand this type of work [*interpretive and critical work*], and they need to have reviewers that can evaluate it bias free.' (P20)

Theme 5: The possibilities of critical management studies

All research participants expressed their opinions on what CMS could contribute to the academic discourse on business management in South Africa. More often than not, these possibilities were sketched against the backdrop of the perceived deficiencies and weaknesses of the dominant positivist paradigm and associated quantitative methods. Therefore, this discussion will assume the same guise by first presenting research participants' critique against positivism and thereafter continuing to opine how CMS can fill these perceived voids.

Research participants voiced the following critique against the dominant positivist paradigm prevalent in the academic domain of business management in South Africa:

- It does not seem to address pressing issues emerging from the business environment. Research participants specifically pointed out that positivist discourse seemed to sidestep issues such as complexity, hyper-change and exploitation and inequality brought about by questionable business practices. Research participants were of the opinion that CMS, due to its scepticism of any type of dominant ideology and structural dichotomies, would be more attuned to such pressing issues and be able to give prominence to them in the academic business-management discourse.

‘Adopting a critical stance in all management theory and practice can ensure that power relationships and exploitative conditions are mediated by values.’ (P1)

‘I use this paradigm in studies where I illuminate that organisations dominate (power) and exploit (top-down approach) instead of being a good citizen. We no longer live in the dark ages; employees are competent to contribute their competence but are hardly afford the opportunity to do so.’ (P10)

‘As such there is clearly a need to look at society and management through a different lens and to challenges the way we do things and the way we think.’ (P4)

‘A critical approach thus “unmasks” inequalities in relationships, questioning the privileging of “having”, that is consuming, over “being” and relatedness to the world. However, it is challenging to accept that marketing scholars avoid these issues in their research, and my venture would be that it is largely driven by some higher level societal process.’ (P7)

- Mainstream business-management thinking does not take due cognisance of the social issues and social agenda that have started to pervade the business-management discourse in recent times. Conventional mainstream business management promotes the

notion of managerialism and as such focusses on the needs of the business more than it does on the needs of organisational stakeholders. Research participants are of the opinion that CMS can promote the interests of stakeholders in knowledge production more than the mainstream can.

‘Only through embedding humanist and robust values that are critical to power abuse and inequality within the student-management cohort, year after year, can we affect societal change and shape a more humane society.’ (P1)

‘Especially from a South African perspective, we need to find alternatives to everyday problems. The plight of ordinary people is often neglected, and CMS could hold the answer. CMS necessitates a rethinking of our role in alleviating the problems associated with the problems experienced by modern society.’ (P17)

‘You need to be evolutionary in your approach, pragmatic in your behaviour, engaged to broaden the parameters of society, understand the importance of the human factor in life/business, learn the proper tools that help you to create successful businesses, believe that there is no one model of how to run a business and that there are alternative approaches to run a business.’ (P15)

‘In my opinion, CMS will challenge industry practises rather than address industry needs.’ (P3)

- The dominant positivistic thinking is not contemplative enough of the inequalities and divisive realities that seem to be associated with capitalism. Positivism assumes that capitalism, as a political economy, is the ideology of choice in terms of progress and the betterment of society as a whole. Research participants felt, however, that CMS forces introspection and greater sensitivity towards inequality and exploitative practices as it has no allegiance with capitalist ideology. In fact, CMS is sceptical of capitalism as an ‘ultimate and infallible’ system that represents progress and prosperity.

‘First, critical inquiry helps us to constantly question ourselves and reflect about our assumptions and worldviews of organisations, their role in society and the role of society in organisations.’ (P12)

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‘The big concern is about the social injustice and environmental destructiveness of the broader social and economic systems that managers and firms serve and reproduce. Effective managers do not just apply traditional management tools but also need to reflect more critically about their role in management and society.’ (P15)

‘It is the objective of businesses to satisfy needs; on the contrary, the needs of stakeholders (and more specifically that of owners) appear to receive preference. The socially divisive and ecologically destructive systems in which we operate and within which managers work are evidence hereof. CMS forces everyone involved to rethink their current role in satisfying needs.’ (P17)

‘Hence, it is about getting things done as opposed to what is morally right. The key problem with a focus on efficiency and effectiveness is that it allegedly marginalises questions pertaining to the interaction between marketing and society.’ (P7)

Resultant from this apparent lack of contemplation, research participants were also of the opinion that positivism does not allow much room for opposing points of view and therefore stifles academic debate and innovative thought as it only entertains notions that support and perpetuate it. As CMS is critical of positivism, it allows scope to debate and interact with points of view that represent various positions within the broader academic domain of business management. The following quotes provide evidence in support of this finding.

‘It investigates the “other side of an argument” and as such is different from mainstream research because it challenges the status quo.’ (P10)

‘It requires reconsidering current structures, thoughts [*sic*] processes, approaches, economic, political and managerial behaviour, our understanding of the true meaning of sustainability as well as the way in which we assume factors of production should be distributed. Our major responsibility could be to stimulate and facilitate conversation on our understanding of concepts such as feminism, anarchism, communism, green thinking and so on.’ (P17)

‘Critically reflecting on the nature of management. This is to ongoing ask yourself: “Am I doing the right thing, and what I am doing, is it effective and efficient?”’. (P15)

‘Yes, there are limits to positivistic thinking and methods. There is also a void in terms of management theory to deal with issues of complexity.’ (P2)

■ Conclusions and recommendations

From the findings presented above, the following is evident:

- The academic domain of business management in South Africa is dominated by positivist thinking with knowledge production taking a predominantly quantitative guise.
- This dominance leaves little room for alternative epistemologies and, resultantly, provides very few opportunities for qualitative, critical and conceptual work to be published in South African journals.
- The overreliance on quantitative methodologies is creating a situation where research outputs deliver little in the form of genuinely new knowledge. Instead, business-management scholarship in South Africa seems to be typified by restating what is already known.
- Institutional pressure to publish is, at least partially, responsible for academics reverting to the ‘tried and tested’ avenue of getting published. This means that they are not being afforded the freedom to explore other epistemologies and paradigms as this would imply longer time frames to get published initially.
- The ‘relevance vs. research’ gap, that is, the gap between academia and industry, is widening, and both industry and academia tend to operate in distinct silos.
- There seems to be a need to create more space for and capacity in alternative methodologies. This is not tantamount to a revolt against positivism and its preference for quantitative methodologies. Rather it is a call to encourage innovative debate in the domain of business management.

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- The shortcomings cited against positivism can be addressed by other epistemologies, and CMS has the potential to engage with some of the pressing issues arising from the South African context.

If one refocuses on the research question posed in this study, namely ‘How susceptible is the academic domain of business management in South Africa to CMS?’, the findings suggest that the answer to this question can be interrogated at numerous levels:

- On an individual and personal level, it would seem that the majority of South African business-management academics concede that the paradigmatic dominance of positivism has certain pitfalls which necessitates different views and approaches to business-management teaching, research and practice. Thus, at the individual level, the answer to this research question is that academics seem very susceptible to the notion of CMS and other epistemologies that challenge the pervasiveness of the dominant, positivist paradigm.
- However, on an institutional level, that is, at the level of a business-management department as a whole or at any given university, workload pressure and the pressure to publish tend to force people to ‘stick to what they know’ and perpetuate tuition and research practices that have been followed in the past. The concern is that developing new curricula or climbing the learning curve of a new research paradigm consumes much effort and time, which academics cannot afford in the contemporary higher-education environment. On this level, thus, the answer to the research question seems to be a conditional one. People would be willing to explore CMS but not at the expense of the objectives their work environments place upon them.
- Also, on a scholarly society level, that is, at the realm of business-management journals and conferences, findings seem to indicate

that the scholarly community is not necessarily susceptible to alternative epistemologies as evidenced by the editorial policies and practices of South African business-management journals. Due to the pervasiveness of positivism and quantitative methods amongst South African business-management academics, review panels of journals do not always possess the expertise to be able to review submissions of a CMS nature.

To summarise, it would seem that individual academics are susceptible to the notion of CMS and other alternative epistemologies but that there are institutional barriers that limit the proliferation of capacity in and spaces for alternative epistemologies such as CMS. Although there seems to be individual efforts and incremental progress in terms of creating capacity and space, there seems to be a lack of coordinated effort to make significant inroads in this regard.

Although it is recognised that this was a very modest study that set out to answer a very simple question, it has uncovered some interesting facets of the nature of the domain of business-management scholarship in South Africa. It is evident that academics overwhelmingly feel that alternative epistemologies such as CMS need to have space within which they can develop in order to contribute meaningfully to the South African business-management discourse. As scholars, we always point out to our students that the business environment is constantly changing and evolving and that business needs to keep up with the challenges laid down by these changes. In the same vein, as academics we also need to realise that higher education is changing, and this change often has more far-reaching implications than we wish to accept. In keeping with this change, academics need to constantly adapt their efforts in terms of both tuition and research to remain relevant and useful.

■ Chapter 7: Summary

Since the so-called paradigm wars of the 1980s and 1990s, many social sciences, including business management, have entered a state of methodological tolerance where positivists and anti-positivists are involved in an uneasy truce. The aftermath of these paradigm wars have highlighted the necessity for a multi-paradigmatic approach to social sciences. Against this backdrop, critical management studies (CMS) has made its way into the business-management discourse in the early 1990s. However, in South Africa, there seems to be a marked lack of a coherent body of knowledge on and awareness amongst business-management academics of CMS. Based on this, Chapter 7 sets out both to establish the level of familiarity amongst business-management scholars regarding CMS and to assess the prevailing climate in the domain of business management.

By means of a two-stage qualitative survey, data were firstly gathered regarding the level of familiarity with CMS from 88 senior South African academics at 16 higher-education institutions. In stage two of the qualitative survey, data were solicited from 21 senior academics at 13 higher-education institutions. This data were subject to content analysis, employing Creswell's (2003) coding principles. Findings revealed that, although individual academics were open to exploring a paradigm such as CMS, the paradigmatic dominance of the positivist tradition in South Africa has resulted in institutional challenges that hinder a coherent effort to expand CMS as an emergent paradigm in South Africa.

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Chapter 1

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This book represents the first attempt to compile a definitive work on Critical Management Studies (CMS) in South Africa. It spans seven chapters dealing with issues of CMS content and context. As South Africa is currently facing a call for transformation in various spheres, including the workplace and education, this book offers an attempt to problematise and scope pressing issues within the South African context.

Many of the insights offered in this book are rooted in the postcolonial discourse and offer alternative insights to issues such as decolonisation, workplace inequality, indigenous knowledge, technology, management education and knowledge creation.

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