



Revista de Administração de Empresas

ISSN: 0034-7590

ISSN: 2178-938X

Fundação Getúlio Vargas, Escola de Administração de Empresas de S.Paulo

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WANDERLEY, SERGIO EDUARDO DE PINHO VELHO
PASSADO, PRESENTE E FUTURO DE HISTÓRIA (CRÍTICA) DAS ORGANIZAÇÕES NO BRASIL
Revista de Administração de Empresas, vol. 61, no. 1, e2021-0103, 2021
Fundação Getúlio Vargas, Escola de Administração de Empresas de S.Paulo

DOI: 10.1590/S0034-759020210107

Available in: <http://www.redalyc.org/articulo.oa?id=155166528003>

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ESSAYS

Invited article

Translated version

DOI: <http://dx.doi.org/10.1590/S0034-759020210107>

PAST, PRESENT, AND FUTURE OF (CRITICAL) ORGANIZATIONAL HISTORY OF IN BRAZIL

This study aims to build a narrative about the trajectory of the incorporation of history, memory, and the past in the research of organizational studies (OS) in Brazil and to reflect on its possible developments. Like all research on the past, it is assumed that this narrative is a possible (and hopefully credible) version that does not invalidate others. On the contrary, without pretending to present itself as a manifesto and/or crystallize a specific narrative, it seeks an open dialogue and the shared construction of a scientific community around the topic.

The relevance of this construction lies in the fact that the trajectory of approaching two disciplinary fields as different as OS and History (Rowlinson, Hassard, & Decker, 2014) can also be understood as the trajectory of the formation of a research field in Brazil.

It should be noted, however, that the institutional context of approximation and dilution of borders between fields has not been exactly the same as that of other academic spaces outside the country (such as in North America and Europe). For example, there was no increase in the number of transfers of business historians from university history departments to business schools (Decker, 2013). On the contrary, the researchers responsible for building this bridge in Brazil were (and are), with rare exceptions, from the management field. Thus, *Business History* is scarcely addressed in the Brazilian OS, and remains of prominence only in the studies of the Brazilian economic thought in the field of Economics.

Therefore, since 2000, researchers from different theoretical-methodological matrices in the field of Management and OS in Brazil have sought to defend and justify the importance of the study of History in their research as a way of enriching the understanding of organizational phenomena in the present. In order to articulate this trajectory, we chose to restrict our research to a specific time frame, thus establishing origin and meaning. Furthermore, assuming that any periodization is a political construction of the researchers (Prost, 2012), we arbitrarily chose the following historical milestones as the basis for the narrative: (1) the 2000s; (2) the 2010s; and (3) the 2020s.

The 2000s: For more history and memory in Brazilian studies

The trajectory of historical research in Management and OS began with a more straightforward performance, both in the area of research and in the formation and guidance of students, of researchers interested in Brazilian management history. The focus was on identifying and analyzing the specific context in which Brazil was immersed (beyond the universal theoretical models and the great narratives that encapsulated particularities) through the historical analysis of its organizations and social practices.

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One of the initial milestones of this movement is the dissertation of [Tania Fischer \(1984\)](#), "The teaching of public administration in Brazil, the ideals of development and the dimensions of rationality." In this work, the author investigated, through documents, the teaching of public administration in Brazil, suggesting that "the creation and development of EBAP were a result of the developmentalist ideology in force in the country since the 40s and 50s" ([Fischer, 1984, p. 12](#)). Subsequently, other researchers also contributed to this movement, such as Carlos Osmar Bertero (FGV EAESP), with studies on teaching and research in business administration in Brazil; Paulo Emílio Matos Martins (UFF, FGV EBAPE), with studies on business administration, history, and Brazilian social thought; and Alexandre de Pádua Carrieri (UFMG), with studies on history, memory, and daily life.

However, only since the year 2000, it has been made possible to identify more recurrently master's theses and doctoral dissertations being defended and published in discussion forums of the field of Management and OS. This has been the case, just to cite a few examples, with the dissertations of [Isabela Baleeiro Curado \(2001\)](#), [Ariston Azevedo \(2006\)](#), [Fernando Coelho \(2006\)](#), [Fábio Vizeu \(2008\)](#), and [Claudiani Waiandt \(2009\)](#). Along with the emergence of these works, and in line with the historical turn in OS ([Booth & Rowlinson, 2006](#); [Clark & Rowlinson, 2004](#)), claims for more history also began to emerge, emphasizing the importance of the historical perspective to understand the organizations in time and space, and the relevance of historical research as a way of accessing knowledge ([Costa, Barros, & Martins, 2010](#); [Vizeu, 2010](#)).

Thus, the researchers investigating about history at this time were primarily interested in: (a) reflecting on the social practice of the researcher; (b) considering the potential contribution to research in view of the new perspectives on objects, problems, and research approaches ([Costa et al., 2010](#)); and (c) the urgency of shifting the focus of analysis from exogenous to local, rescuing the historical and intercultural aspects in opposition to the dominant ideological reproduction, which tends to exclude the past or the context from organizational theories and practices ([Vizeu, 2008, 2010](#)).

Subsequently, the claims were expanded not only to include more history in research but also other forms of representation of the past, such as memory, collective memory, and biographical perspectives related to oral sources and memorial narratives (biographies, autobiographies, oral history, and life stories).

In the case of memory, it can be identified that most foreign studies on memory (and on the organizational spaces of memory) in the area of Management focus on its more instrumental use, with organizational memory being understood as a repository of information about the past that can be accessed and used

by company managers in the decision-making process ([Walsh & Ungson, 1991](#)). In other words, accessing the organizational past through an information bank that accumulates, systematizes, and put in order knowledge about what has already happened is now understood as a precious source of organizational learning, and even competitive advantage ([Holan & Phillips, 2004](#)). However, this was not quite the case with Brazilian research on OS. More in line with the proposal of [Rowlinson, Booth, Delahaye, and Procter \(2010\)](#), the Brazilian studies of memory, social memory, and organizational spaces of memory end up prioritizing oral sources and the idea that the ascension of oral history and biographical methods (especially life stories) can contribute to the advancement of knowledge about the past ([Carrieri & Lopes, 2012](#); [Lopes & Carrieri, 2010](#)).

However, although significant, national attempts to bring the areas closer were still incipient, since, despite the efforts and articulations, there did not yet exist "[...] associations, research centers, specialized journals or an exclusive space for discussion in national congresses about the historical perspective in Business Administration" ([Costa et al., 2010, p. 289](#)). This framework changed in the following years, configuring (in our understanding) a new milestone in the trajectory of this movement. In addition to the claims for more history and memory in research, a more systematized and formal movement began in 2010 to give prominence to historical research as a theoretical-methodological procedure. Publications, panels, and workshops on how to do historical research in OS appeared in journals and events in the field.

The 2010s: For more knowledge about the theoretical-methodological procedures of historical research

Evidence allows us to argue that from the year 2010, the topic of historical research started to acquire greater legitimacy and representativeness in the field of OS in Brazil. First, continuing the momentum of the previous period, the number of dissertations on the topic continued to increase. Among them are the works of [Lima \(2009\)](#), [Barros \(2013\)](#), [Joaquim \(2014\)](#), [M.A.F. Silva \(2018\)](#), [E. Silva \(2019\)](#), and [Correia \(2020\)](#), UFMG; [Carneiro \(2015, 2019\)](#), EAESP/FGV; [Wanderley \(2015\)](#), EBAPE/FGV; [Calgaro \(2016\)](#), [Morgado \(2016\)](#), and [Biscaia \(2018\)](#), UP; [Caminha \(2014\)](#), UFRGS; [Souza \(2016\)](#) and [M. Silva \(2017\)](#), UFBA; [Chaym \(2017\)](#), [Bezerra \(2019\)](#), and [Lopes \(2019\)](#), UECE; [Pio \(2018\)](#) and [Boschi \(2018\)](#), Unigranrio; [M.A.C. Silva \(2018\)](#), [Quelha-de-Sá \(2018\)](#), [Fucs \(2019\)](#), and [Santos \(2019\)](#), PUC-Rio.

In addition to this movement within the Graduate Programs, another indication was the creation, in 2011, within the scope of the OS division of the National Association for Graduate Studies and Research in Administration (ANPAD), of the topic of interest “history and memory in organizations.” The coordinator of the OS division at that time was Alexandre de Pádua Carrieri (UFMG), and the new topic was led by Monica de Aguiar McAllister (UFBA). The topic descriptor, formalized for the first time in the largest Brazilian Business Administration Congress, is a good indication of the interests and the path followed by the researchers in this period:

Organizational and historical studies, under any epistemological, ontological, theoretical, and methodological orientation of history, including organizational analyses based on historical approaches, with the construction of theoretical and conceptual historical frameworks, and using historical methods. Historical construction of the Brazilian organizational reality that brings organizational knowledge closer to the reality. Historical research that contributes to the innovation of the production of organizational knowledge. (ANPAD, 2020a)

From that moment on, the topic was led by other researchers, and it remains active even today not only in ANPAD events but also in events of other associations, such as in the last three editions of the Congress of the Brazilian Society of Organizational Studies (CBEO).

The third evidence that allows us to think about a process of formalization of the topic in OS is the beginning of the creation of a historiographic line of *Management History* in Brazil. Focusing on this perspective of analysis, a group of researchers investigated the history of management in Brazil (Alcadipani & Bertero, 2018), the role of journals in the construction of the field (Tonelli, 2017, 2018), and the history of business administration teaching in Brazil by analyzing the history of specific organizations, such as FGV/EAESP (Alcadipani & Bertero, 2012, 2014), FGV/EAESP and FEA (Valle, Bertero, & Alcadipani, 2013), FACE/UFMG (Barros, 2014), UFBA (Bertero, Barros, & Alcadipani, 2018), UFRGS (Barros, Alcadipani, & Bertero, 2018), Schools of Commerce and Higher Education (Barros, 2013, 2017; Barros & Carrieri, 2013), ISEB and ECLAC (Wanderley, 2015, 2016), and IDORT (Vizeu, 2018).

Lastly, the theoretical-methodological procedures of the research addressing history and memory (Lipartito, 2014; Yates, 2014) have not yet reached – also in Brazil – their full

potential for interdisciplinary dialogue (Wadhvani, Suddaby, Mordhorst, & Popp, 2018). It can be said that the historical method is easy to circumscribe, that is, it is not easy to implement. Responding to this concern and in order to overcome the current situation, specific subjects have been created in postgraduate courses in Management on historical research in OS, such as “History, Memory, and Organizations” at universities UNIGRANRIO and PUC-Rio; “Historical Research in Administration” at PUC-Rio; and “Organizations, History, and Language” at Positivo University. At the same time, the number of workshops organized in the context of the aforementioned national events have increased. The focus of the subjects and workshops is broad, ranging from how to work with historical documents in physical and digital archives – whose importance was already highlighted by Barros (2016) and Coraiola (2012) – to how to collect and handle oral sources in oral history and life history research (Barros & Lopes, 2014).

As an illustration (and in support) of this argument, the descriptor of the topic of interest for ENANPAD 2020 expresses quite clearly the importance given to the methodological procedures of historical research:

[...] the following studies are welcome: those that analyze how historical sources and archives contribute to understand organizational phenomena and their articulation with the social and political; encourage debates on how historical research in management and organizational studies allows engagement with the past that goes beyond the superficial or merely descriptive; discuss how organizations strategically instrumentalize their past by creating and managing their collections and documentary archives, building meanings from disputes between official memories and silenced memories; are based on diverse sources such as public archives, private and/or business archives, archives of the National Truth Commission; period newspapers; movies; documentaries and sources based on oral, life, and/or thematic history; address the relations between public education policies, education organizations, and business administration disciplines. In this sense, texts dealing with the biographical method in its various historical and psychosocial approaches [...] are also considered along this thematic line (ANPAD, 2020b).

The 2020s: In search of a critical and reflective position on the past and its forms of representation toward internationalization

In order to reflect on possible developments in the historical trajectory of the incorporation of history, memory, and the past in OS research in Brazil, the work of Wanderley and Barros (2019) may be a good starting point. The authors, without pretending to predict the future, offer us some clues about the challenges to be faced in the next decade: how to manage, and at the same time, choose specific authors/theories, concepts, and national themes and maintain dialogue and relevance with the international public?

This challenge, far from being a novelty in the area of OS (see, for example, Caldas & Alcadipani, 2006), is now even more remarkable in this field of research. If, on the one hand, the consolidation of the historical turn proposed by the Anglo-Saxon world legitimized the subfield *historical organization studies* (Maclean, Harvey, Clegg, & Stewart, 2016), increasing the chances of publication abroad, the presence of authors and themes from other geographical locations remains limited (Wanderley & Barros, 2019). The recent proposal of creating an even more specific subfield, *critical organizational history* (Durepos, Shaffner, & Taylor, 2019), opens new possibilities, as it demands more critical and reflexive views about the historical turn. As is clear from the call for this forum, there is a need to “explore the implications of the historic turn in management and organization studies based on multiple theoretical, epistemological, cultural, and geographical locations” (Barros, Coraiola, Maclean, & Foster, 2019, p. 1).

We highlight here the need to include geographical locations other than the Anglo-Saxon world in the historical turn (Wanderley & Barros, 2019). The critical authors of the Anglo-Saxon world themselves warned that a dialogue between researchers beyond this world will probably require us to resort to authors such as Marx, Foucault, Lacan, and Gramsci (Mir & Mir, 2012). Certainly, authors such as Foucault and Gramsci increase the chance of getting published abroad in publications on the critical history of organizations. However, we should be aware not to become “proud critical (or advanced) thinkers” without realizing that we are being Eurocentric (Dussel & Ibarra-Colado, 2006, p. 491).

Thus, the challenge facing us can be described by the aphorism of Oswald de Andrade (1928), who anthropophagically devours the Hamletian dilemma: “*Tupi, or not tupi that is the question*”. In other words, will we follow the safe path of uncritically adhering to the proposals (criticisms) of the historical turn or will we face the challenge of inscribing our various Tupi origins

– authors/theories, concepts, and topics – in the (international) house of knowledge?

There are no easy solutions, but we are sure that not seeking our own representations of the past (stories, memories, and fictions), authors, theories, and concepts would mean losing relevance, and therefore, it is not a plausible option. Moreover, several Brazilian researchers have faced this challenge and can show us possible ways to follow. For example, Cooke and Alcadipani (2015) investigated Ford Foundation funding for EAESP/FGV to illustrate a possible global history of business administration education. Alcadipani (2017), based on a post-colonial approach – already consolidated in the Anglo-Saxon world – utilized the concept of sociological reduction of Guerreiro Ramos for his research on the circulation of knowledge in business administration in the periphery. Barros and Wanderley (2019) used Francisco Weffort's concept of populism to investigate the phenomena of *Trumpism* and Brexit. These last two works show the potential of Brazilian social thought in understanding current phenomena. Quelha-de-Sá and Costa (2019) investigated the history of the construction of the São Paulo Resistance Memorial based on the *ANTI-history* theoretical-methodological model – which originated in Canada (Durepos and Mills, 2012) – unveiling narratives silenced and put aside by the official history of the Brazilian military dictatorship. Wanderley and Barros (2020) opted for the theoretical-methodological approach known as *Burke's Pentad*, proposed by the American literature theorist Kenneth Burke, to investigate how the Alliance for Progress has influenced the teaching of development administration management in Brazil. Barros and Taylor (2020) used Gramsci's theoretical contributions to investigate the performance of the Institute for Research and Social Studies (IPES) in Brazil in the 1960s, and thus discuss how *think tanks* have become key in the current moment for the acceptance of pro-corporate ideologies by civil society.

Therefore, what seems to us to be outlined here is the articulation of an author/theory, concept (Alcadipani, 2017; Barros & Wanderley, 2019), or national theme (Barros & Taylor, 2020; Cooke & Alcadipani, 2015; Quelha-de-Sá & Costa, 2019; Wanderley & Barros, 2020) with an international theoretical or methodological approach (Alcadipani, 2017; Barros & Taylor, 2020; Quelha-de-Sá & Costa, 2019; Wanderley & Barros, 2020), so that our various Tupi origins can take a seat at the table of the house of knowledge (Anglo-Saxon) and thus communicate.

This kind of articulation can also be a way of avoiding falling into the trap of parochialism and continuing to tell our own stories to ourselves. However, we must be careful not to become lax when promoting the “translation” of our themes to an international audience. Regardless of the articulation

implemented, we understand that reflexivity as a methodical attitude – as [Guerreiro Ramos \(1958\)](#) suggested for sociological reduction – should accompany each stage of historical research: in the selection of problem and sources, in the construction of theoretical approach, in the construction of methodological framework, and in the construction of narrative, which will always be outlined by the "art and craft" of the researcher.

Above all, we understand that it is necessary that we appropriate the concept of Amerindian perspectivism of [Viveiros de Castro \(2018\)](#) for the formation of a field of critical organizational history in Brazil. In this way, we can promote a reversal of the logic promoted by the Anglo-Saxon world in the construction of knowledge. To paraphrase [Viveiros de Castro \(2018\)](#), it is not a matter of using (Western) authors who are widely familiar to us – such as Foucault and Gramsci – to investigate our "exotic" stories, but of "interpreting the philosophers in the light of wild thought, and not the other way around: it is about updating the countless becoming-others that exist as virtualities of our thinking" (p. 90). Therefore, we should start with our authors/theories, concepts, and themes to articulate with those similar internationally. Moreover, [Guerreiro Ramos \(1958\)](#) had already suggested that "in the light of sociological reduction, all foreign scientific production is, in principle, subsidiary" (p. 83).

Based on these premises, we would like here to expand the (internationalized) research agenda – not aiming to make it exhaustive, but rather to launch an invitation for its extension – to a subfield of critical organizational history in Brazil articulated with potentially similar international themes and studies, such as:

- **Articulation of authors and theories:** Authors of Brazilian social thought (already mentioned, but not yet explored to their full potential, see: [Martins, Gurgel, Lima, Darbilly, Justen, & Santos, 2013](#)), such as Darcy Ribeiro, Milton Santos, and Paulo Freire, articulated with decolonial studies. Authors and theories of the Instituto Superior de Estudos Brasileiros (ISEB, 1955-1964), such as Roland Corbisier, Álvaro Vieira Pinto, Hélio Jaguaribe, Candido Mendes, and Nelson Werneck Sodré (see [Wanderley, 2016](#)), articulated with authors of the Frankfurt School.
- **Articulation of concepts:** The concept of overexploitation of the work of [Rui Mauro Marini \(2012\)](#) articulated with the concept of necrocapitalism of [Bobby Banerjee \(2008\)](#) to investigate, for example, the process of uberization of the worker. The concept of sociological reduction of [Guerreiro Ramos \(1958\)](#) with the concept

of reflexivity suggested by [Alvesson and Sköldberg \(2000\)](#). The concept of Amerindian perspectivism ([Castro, 2018](#)) with the concepts of *border thinking* ([Mignolo & Tlostanova, 2006](#)) from decolonial studies and *third spaces* ([Bhabha, 1994](#)) from the post-colonial approach.

- **Articulation of research topics:** Brazilian historiography on the support and participation of companies in practices of human rights violations of workers in the Brazilian military dictatorship (see [Costa & Silva, 2017, 2018](#)) articulated with the complicity of corporations with totalitarian regimes during World War II (see [Schrempf-Stirling, Palazzo, & Phillips, 2016; Stokes & Gabriel, 2010](#)). The impact of the export monoculture model based on slavery in Brazil (see [Taunay, 2001](#)) on the emergence of management articulated with the similar model in the US as investigated, for example, by [Bill Cook \(2003\)](#). This last suggestion can help us understand the working relationships that still permeate organizations in Brazil. Finally, the studies of history, memory, and organizational narrative processes in memory spaces of freedom and resistance in Brazil ([Quelha-de-Sá & Costa, 2019](#)) could be articulated with research on *storytelling* ([Foster, Coraiola, Suddaby, Kroezen, & Chandler, 2017](#)), corporate historical responsibility ([Coraiola & Derry, 2019](#)), and *rhetorical history* ([Suddaby, Foster, & Trank, 2016](#)).

Most importantly, the goal of the initial agenda in the critical organizational history (and not only in Brazil) is to (re) visit the past to denaturalize and confront the present and thus imagine future scenarios. The greatest challenge is the same as that faced by OS in other subfields: the construction of theoretical-methodological approaches beyond foreign thought. In other words, our agenda would be, as Manuel Bandeira wrote in a poem about Lúcio Costa's project for the construction of Brasília (the federal capital), "an airplane en route to the impossible Utopia, [but whose project] soon gives to the initiative, which it seemed like an adventure, a plausible sense." Twenty years ago, pursuing an agenda in the critical organizational history might have seemed like "an adventure," but today we have a "plausible sense" of the institutionalization of a fruitful field of research in Brazil and abroad. This provides us greater visibility, but also increases our responsibility concerning the accuracy and relevance of our research. Let us go together.

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AUTHOR'S CONTRIBUTIONS

The work was thought out, reflected on, and written together. The authors worked together from the collection of information, the conceptualization and theoretical-methodological approach, the theoretical review (literature survey) to the writing and final review of the text.