THE EMANCIPATORY SYSTEMS APPROACH
TO STRUCTURING THE COERCIVE ORGANIZATIONAL
PROBLEMS [a]

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Abstract

The main research objective of this paper is to critically reassess the conceptual foundations and the methodological and methodical development of the Critical Systems Heuristics (CSH) - as a relevant representative of the emancipatory paradigm - in order to determine the conditions, ways and achievements of its application in structuring the coercive management problems in organizations. The scientific instrumentarium corresponding to this research aim is critical systems thinking with its three key commitments to: a) critical awareness of the strengths and weaknesses of any research instrument - a theory, a methodology, a method, a technique, a model - for managing the problem situations, including the CSH, as the emancipatory systems approach to management, b) improvement of structuring those coercive problems in organizations, in which the sources of coercion can be identified, and c) pluralism - respect the different perceptions and interpretations of problem situations in organizations, and enable the combined use of selected research instruments. The main research result is the knowledge that the CSH - considering its conceptual foundations, and methodological and methodical development - enables to reveal the normative contents of the proposed designs of organizational systems, i.e. enables to identify the stakeholders who benefit from the proposed changes implementation. Based on this finding, it can be concluded that through the use of the critically heuristic categories and dialectical debate between those involved and those affected by the designs, but who are not included in decision making, the CSH endeavours to - in application - support the process of improving the position of all stakeholders.

Key words: coercive management problem context, the emancipatory paradigm, the systems methodology, Critical systems heuristics, improving the stakeholders' position.

ЕМАНЦИПАТОРНИ СИСТЕМСКИ ПРИСТУП СТРУКТУРИРАЊУ ПРИСИЛНИХ ОРГАНИЗАЦИОНИХ ПРОБЛЕМА

Апстракт

Главни истраживачки циљ овог рада је критичко преиспитивање концепцијских основа и методолошког и методског развоја Критичке системске хеуристике, као релевантног представника еманципаторне парадигме, како би се одредили услови, начини и домети њене примене у структурирању присилних управљачких проблема у организацијама. Научни апарат примерен постављеном циљу истраживања је критичко системско мишљење, са своје три кључне обавезаности на: а) критичку свест о снагама и слабостима било ког истраживачког инструмента – теорије, методологије, метода, технике, модела – за управљање проблемским ситуацијама, па и Критичке системске хеуристике, као еманципаторног системског приступа менаџменту, б) унапређивање структурирања оних присилних проблема у организацијама, у којима извори присиле могу бити идентификовани, и в) плурализам – уважавање различитих перцепција и интерпретација проблемских ситуација у организацијама и омогућавање комбинованог коришћења одабраних истраживачких инструмената. Главни резултат истраживања је сазнање да Критичка системска хеуристика – с обзиром на своје концепцијске основе и методолошки и методски развој – омогућава откривање нормативних садржаја сваког предложеног дизајна организационих система, односно, омогућава идентификовање стејкхолдера који имају користи од имплементације предложених промена. На основу овог сазнања, може се закључити да Критичко системска хеуристика настоји да у примени подржи процес унапређивања позиције свих стејкхолдера кроз коришћење критичкохеуристичких категорија и дијалектичке дебате између оних који су укључени и оних који нису укључени у одлучивање, али који су погођени односним дизајнима.

Кључне речи: присилни управљачки проблемски контекст, еманципаторна парадигма, системска методологија, Критичка системска хеуристика, унапређивање позиције стејкхолдера.

INTRODUCTION

Along with the dimension of systems, that holistically conceptualizes the complexity of management problems in organizations, the important dimension of the real-world problems is the dimension of the relationships between the participants (Flood & Jackson, 1991, pp. 33-35; Petrović, 2013, pp. 97-116). The participants dimension refers to the relationships between stakeholders, i.e. between individuals and groups who are interested in the problem area and dealing with it. An assessment of the unitary, pluralist, coercive nature of the management problems in organizations should be built into understanding of the concerned problem situation and into its creative structuring.

In contemporary circumstances, the management problems in organizations that are characterized by coercion represent a relevant

research subject. It is about the problem contexts in which the participants do not share common interests, and their values and opinions are in conflict. The participants do not agree on the ends and means, and cannot make a true compromise. The different groups, i.e. individuals, strive to - using the power they have - impose their own favoured strategy and decisions on others. Also, it is assumed that the sources of power of different stakeholders can be identified.

Creatively dealing with the coercive management problem contexts in organizations implies the use of an appropriate, emancipatory paradigm. Within the emancipatory understanding of the social, i.e. organizational reality, the focus is on the doubt in the existing social, i.e. organizational order and on the endeavouring to reform it radically (Jackson, 2000, p. 291). That is, in the emancipatory paradigm, the contradictions in the system and conflicts between its different groups are in the centre of the research, with the aim of facilitating people' release from the influences of the existing social, i.e. organizational structures (Burrell & Morgan, 1979, p. 34). In relation to the other paradigms - the functionalist, interpretive, and postmodernism (Jackson, 2000; 2003; 2006a, pp. 868-878; 2006b, pp. 647-657; Petrović 2013, pp. 97-116), the main research attention in the emancipatory paradigm has been shifted to ensuring fairness in the organizations, whose functioning is considered to be improved as much as the discrimination of any kind is eliminated, and a full and open participation is encouraged so that the people can participate in problem-solving and decision-making. So, the emphasis is on the people's emancipatory interest (Habermas, 1972, p. 308; Flood & Jackson, 1991, p. 49; p. 244) in releasing themselves from the limitations imposed by the power relations, as well as in learning, through a process of authentic participatory democracy. The metaphor of psychic prison (the focus is on the ethical dimension of organizations) and the metaphor of the instruments of domination (the negative results of improving certain interests at the expense of others, and understanding how the actions that are considered as meaningful from one aspect can appear as the exploitative from other viewpoints are in the focus) are appropriate for the emancipatory paradigm (Morgan, 1997, pp. 215-249; pp. 301-344).

One of the systems methodologies developed within the emancipatory paradigm is the Critical Systems Heuristics (CSH) (Flood & Jackson, 1991, p. 36; p. 40; pp. 197-221; Jackson, 2000, pp. 315-320; Jackson, 2003, pp. 23-24; p. 27; p. 40; pp. 213-231; Jackson, 2006a, pp. 868-878; Jackson, 2006b, pp. 647-657; Petrović 2013, pp. 97-116). As the emancipatory systems approach to management, the CSH is appropriate for the coercive management problem context in organizations (Ulrich, 1991, pp. 103-115; Ulrich, 1994; Ulrich, 2003, pp. 325-342; Ulrich, 2007, pp. 1109-1113; Ulrich & Reynolds, 2010, pp. 243-292). The key issues discussed within the CSH are: Who benefits from the proposed changes or the new

system designs in conflict situations?, i.e. Where does the coercion exist, how is it manifested, and what are its relevant consequences? The CSH endeavours to enable the stakeholders to reveal the normative content of the existing and/or proposed designs of organizations and identify the possible alternative designs.

In accordance with these preliminary considerations, the conceptual framework, and the resulting methodological and methodical development of the CSH, as a particular emancipatory systems methodology, represent a scientifically, socially and practically valuable research subject.

The main aim of the research process is to - through a critical reassessment of the theoretical foundations of the CSH and its methodology and methods - acquire relevant knowledge about the conditions, ways and achievements of use of this emancipatory systems approach to structuring the coercive management problems in organizations.

The basic hypothesis, that should be tested in the research process, is that the CSH, as the methodological expression of the emancipatory paradigm, pursuant to its own conceptual foundations and methodological-methodical development, can be employed in a scientifically based, practically useful and socially responsible way in creative dealing with those coercive management problems in organizations in which the sources of power can be identified.

As the scientific instrumentarium corresponding to the determined research subject, aim and hypothesis, the contemporary critical systems thinking with its three key commitments to: a) critical awareness of the strengths and weaknesses of each research instrument - theory, methodology, method, technique, model - including the CSH, as the emancipatory systems methodology, b) improvement of the management process of coercive problems in organizations, in which the sources of coercion can be revealed and c) pluralism - ensuring the legitimacy to different stakeholders' interests, to their value systems and opinions, particularly those stakeholders who are not involved in designing the organizational systems, but who are affected by those designs, as well as enabling a combined employment of the research instruments that may belong to different paradigms, will be used (Jackson, 2000, pp. 355-357; pp. 362-367; pp. 375-377; Jackson, 2003, pp. 303-304; Jackson, 2010, pp. 133-139; Li, Zhu, & Gerard, 2012, pp. 209-220; Mingers, 2006, pp. 3-4; Petrović, 2012a, pp. 797-814; Petrović, 2012b, pp. 1-13; Ulrich, 2003, pp. 325-342; Ulrich, 2012a, pp. 1228-1247; Ulrich, 2012b, pp. 1307-1322; Zhu, 2011, pp. 784-798).

The conceptual foundations of the CSH, its methodological and methodical development will be explored in separate sections of this paper. Then, the main strengths and weaknesses of the CSH will be highlighted, and the domain of its creative use will be identified. In the concluding remarks, after formulating the attitude on the basic scientific hypothesis, the key contribution and limitation of the paper, and the open issues relevant for further research will be specified.

CONCEPTUAL FOUNDATIONS

From the standpoint of the CSH, the main purpose of the systems' thinking is to shape scientifically the planning process of the social and organizational systems, i.e. their designs, in order to ensure the realization of an improvement in the position of the social and organizational systems' stakeholders. Therefore, the systems approach should be regarded as the appropriate use for practical reasons rather than theoretical reasons (Ulrich, 2003, pp. 325-342). Respectively, the aim of the systems approach is to help make the decision what should be done rather than to help generate the knowledge about what something is and how something should be done.

All three concepts within the syntagm: the Critical Systems Heuristics have precise meanings (Ulrich, 1994, pp. 19-23; Jackson, 2000, p. 316). The critical character of the approach requires a self reflection with regard to the assumptions entering into judgment in the search for knowledge and rational action. The critical approach to the design of the organizational system implies that the planners and those affected by the design have to make the normative content of the design transparent to themselves and each other. The design must not be regarded as the only, objective possibility; on the contrary, it has to be subjected to critical reassessment. The idea of the systems refers to the totality of the relevant conditions, i.e. the elements of which the theoretical and practical judgements depend on. These conditions involve a variety of metaphysical, ethical, political, ideological aspects. Since each conception of the world is limited, the idea of the systems is being used as the critical idea of reasoning. The idea of the systems should be understood as an appropriate warning to the necessity of critical thinking about the undoubted shortage of comprehensiveness and objectivity of all designs of the organizational systems. This idea does not assume that the wholeness of a system can be known, but only points out the need for a critical reflection on the evident lack of comprehensiveness in understanding the designs of the organizational systems. Finally, heuristics refers to the process of a continuous disclosure of the 'objectivist' frauds, and the preparation of the planners, those affected by the designs, and/or managers for critical thinking about problem situations. The aim is to provide an appropriate method by means of which the assumptions and their incompleteness can be continually reassessed, rather than theoretically justify the critical concepts.

The following sets of the synthetic *a priory* concepts - deeply involved in the process of generating knowledge - are particularly important for the CSH (Ulrich, 1994, p. 189; Jackson, 2003, p. 216): two pure forms of intuition - space and time - make up the first set; the second set consists of twelve categories - these are pure concepts of understanding that are necessary in order to logically connect the perceptions. The concerned synthetic *a priori* concepts should contribute to a valid cognition of the world. The presented ideas have to be transformed in an appropriate

manner in order to become applicable to the planning as well as design of the systems.

Certain assumptions - in the form of boundary judgements - are undoubtedly entering into the design of organizations. These boundary judgements reflect the designer's judgements about the wholeness of the system, specifically, what he/she considers important for the concerned designing task, what is for him/her of marginal importance, and what is irrelevant (Midgley & Pinzon, 2011, pp. 1543-1554). Also, these boundary judgements reveal the extent of responsibility taken by the designers in justifying their own designs; thereby, the boundary judgements provide the access to the normative implications of the systems designs. The task is to determine a means of the reassessment of the systems designs in order to uncover the boundary judgements that have been made (Jackson, 2000, p. 317). Through the process of thinking, it should be determined which of the mentioned synthetic, relatively *a priori* concepts are characterized by the heuristic necessity (Ulrich, 1994, p. 239).

First of all, along with the concepts of space and time, the concept of purposefulness has been added; it is the additional dimension that is necessary to map the organizational reality. Then, twelve critically heuristic categories have been established in relation to the distinction between those who are involved in any decision of planning (client, decision maker, planner) and those who are affected but who are not included in the decision making process (witnesses). Finally, three quasi-transcendental ideas have been developed (Ulrich, 1994, pp. 259-264): the systems idea, the moral idea and the guarantor idea. These are the critical standards in relation to which the constraints of the special designs of the organizational systems can be compared.

The developed concepts should enable any existing organizational system to be examined from the standpoint of revealing the norms, values, and so on, that have been built into its design. Also, these concepts ought to enable any potential design of the organizational system to be reassessed considering its assumptions.

The heuristic necessity of certain concepts is of a particular importance for understanding the designs of the organizational systems. By using these concepts, it should be shown how certain designs of organizations can be evaluated and accepted for implementation. Thereby, an appropriate participatory debate is required. It is not enough that those involved - by using the heuristically necessary concepts - self-reflect on the incompleteness of their own designs of organizational systems; those involved, also, have to enter into dialog with the witnesses, i.e. the representatives of those affected by the designs but who are not included in the process of designing the systems. The witnesses require a clarification of their problems in everyday language, given that the polemical use of reasoning will be enough to reveal that the concerned designs of the

organizational systems of those involved have been based on the assumptions which can be challenged. Accordingly, only an agreement between all stakeholders can result in the conclusion on what should be done. Through a dialectical solution, the systemic rationality of planners should be associated with the social rationality of those who have to live in certain designs of those organizational systems.

METHODOLOGY

The presented conceptual foundations of the CSH represent the valuable framework for developing the corresponding emancipatory systems methodology for structuring the management problem situations with features of coercion. The methodology of the CSH encompasses the following four phases:
- introduce the dimension of purposefulness,
- determine the principles,
- make the judgments about the designed system the transparent,
- conduct the participatory debate of all stakeholders.

The development of the concerned methodology implies, first of all, an appropriate paradigm of the purposeful systems (Flood & Jackson, 1991, pp. 202-204; Jackson, 2003, p. 217). That is, into the consideration of the organizational reality and the endeavour to improve it, the planners have to include - besides the dimensions of space and time - the additional dimension of purposefulness concerning the self-awareness, self-reflection, self-determination of people as the key entities of the organizational systems. The idea that plans have certain meaning to the interested individuals and groups, and that the plans are of corresponding importance to them, has been embedded in the paradigm of purposeful systems. This idea supports an endeavour that organizational systems be adequately designed, in order to become purposeful systems. Otherwise, they will likely serve people and purposes, but differently than the intended ones. In the purposeful system, the capability to determine the purposes has to characterize the whole system. Then, the system should generate the knowledge important to these purposes as well as to encourage the debate about them. All plans or proposals for design ought to be critically reassessed in relation to their normative contents.

Drawing on three quasi-transcendental ideas about the systems, the moral and the guarantor, the corresponding principles, as a support for the CSH methodology, have been developed. It is about the ideas that should be employed in order to reveal the necessarily conditional character of the understanding of totality. The ideas about the systems, the moral, and the guarantor, applicable to the organizational reality, represent the critical standards in relation to which the constraints of the designs of organizational systems can be compared. The systems idea requires that the participants

think about an inevitable lack of comprehensiveness of the endeavour to map the organizational reality as well as to produce the adequate designs of organizational systems. The key issue is: What can I find out? Then, the moral idea implies that the designers of organizational systems continuously strive - through their own designs - to improve the human conditions for all participants; at the same time, the designers consider the moral imperfections and implications of the designs through constantly questioning the values built-into them. The moral limitations and shortcomings of the organizational systems designs can be best uncovered in relation to those who are affected by the designs but who are not involved in the decision making process. The important issue is: What may I do? Finally, the guarantor idea indicates that there is not any absolute guarantee that planning of the design of an organizational system will result in an improvement. Nevertheless, the planners, i.e. designers of organizational systems should take into consideration the available scientific data, feedback evaluations, etc. as well as the perceptions of experts and other stakeholders. The appropriate procedures ought to be consulted and the agreement between those who are involved in the planning process and those who are affected by the design should be sought out. The relevant issue is: What may I hope for? The planners should employ the ideas about the systems, moral, guarantor as the appropriate critical standards in relation to which the incompleteness and limitations of their own designs can be evaluated. Also, those who are affected by the plans can employ these ideas in order to show a lack of comprehensiveness in the plans - the systems idea, their ethical inadequacy - the moral idea, and their undemocratic nature - the guarantor idea.

The particular phase of the CSH methodology is focused on helping the designers of organizational systems to make transparent - to themselves and others - the judgments about the whole of the designed system. Given that these judgements are constrained by knowledge, ethics, and guarantees, and enter into the designs of organizational systems, the use of the concept of the boundary judgements is essential for this phase of the methodology. When the planners design the systems then they inevitably make the assumptions about the interior of the concerned system as well as about what belongs to its environment. These boundary judgements reflect the designers' judgements about the wholeness of the system in the sense of what is relevant for the respective design-task. The boundary judgements provide the access to the normative assumptions entering into the systems' designs.

The final justification for the practical action has to result from some kind of a participatory debate that involves all relevant stakeholders. As the final element of the CSH methodology, the dialectical solution for the concerned problem has been suggested (Jackson, 2003, p. 219). It is not sufficient that those involved - using the heuristically necessary concepts

- self-reflect on the partiality of their own designs. These designs have to be the subject matter of a dialogue with the witnesses - in practice, with the representatives of those affected by the designs but who are not involved in the planning process of the design. From the witnesses it is expected that they explain their own perceptions and concerns in layman's terms, and the polemical use of the judgements will be *per se* enough to reveal that the organizational systems' designs of those involved in their planning have been based on the rebuttable assumptions. It is argued that only the agreement between all those involved and those affected by the design leads to the conclusion about what should be done.

METHODS

Within the framework of the CSH methodology, the corresponding methods have been developed for helping in the endeavours to make transparent the normative assumptions built into the designs of organizational systems, and for ensuring the dialogue between those involved in planning and those affected by the designs but who are not included in the process of their planning (Jackson, 2003, pp. 220-221).

First of all, the list of twelve boundary questions has been drawn up, as the methodical instrument for revealing the normative assumptions embedded in the design of the considered organizational system. These questions can be used to explore the existing design or a proposed design of the system. The task is to find a means for reviewing the system's design, so that the already made boundary judgements can be revealed, and a means for determining the alternative boundary judgements, i.e. the means for examining where the boundaries of the designed system should be set.

The so-called checklist, consisting of twelve boundary questions, has been made (Flood, 1995, pp. 214-217) in order to perform this task more easily. It is about the questions arising from the twelve critically heuristic categories which are established considering the distinction between those involved in any planning decision - the client, decision maker, designer and those who are affected by the design but who are not included in the decision making process - the witnesses. Concretely, (Ulrich, 1994, pp. 250-251) the questions concerning the client dealing with the sources of the motivation for the built-in the design; the questions concerning the decision maker address the sources of control; the questions concerning the designer, i.e. planner tackle the sources of expertise; the questions concerning the witness reflect on the sources of the legitimacy of the design. So, the distinction between the client, decision maker, designer, and witness results in four groups of questions. For each of these groups, three questions have to be posed per group, and, as a result, the complete set of twelve boundary questions has been defined (Ulrich, 1994, p. 258): the first question is about the social roles of those involved and those who

are affected by the design; the second question refers to the problems of their specific roles; the third question concerns the key problems of developing the boundary judgements in relation to a particular group.

The twelve boundary questions' ability to reveal the normative content of the design of the organizational system is most noticeable if they are specified in two different contexts: 'is' mode and 'should' mode, and the answers placed one against the other. For example, the answer to the question: Who is the real client of the considered design of the system S? should be compared to the answer to the question: Who should be the client of the system S that ought to be designed? etc.

The formulations of the twelve boundary questions of the CSH in the 'is' mode are: Who is the actual client of the system S design, i.e. who belongs to the group of those whose purposes are being served by? What is the actual purpose of the system S design, measured in the categories of the real consequences, and not in the categories of the declared intentions of those involved? What is built into the success measure, estimated according to the consequences of the design? Who is actually the decision maker, i.e. who can really change the success measure? What are the conditions of successful planning and implementation of the system S design really under the decision-maker control? What conditions the decision maker does not control, i.e. what is the environment for him/her? Who is really involved as a planner? Who is involved as an expert, what is the type of his/her expertise and what is his/her role? What is a guarantee for those involved that their planning will be successful? (For example, the experts' theoretical competence, the consensus among the experts, the empirical data' validity, the relevance of mathematical models or computer simulations, the political support, the experience and intuition of those involved, etc.) Who from the witnesses represents the problems of those who are affected by the design or those who can be affected by the design without being involved in making the decisions about the system's design? Is the possibility of releasing from the experts being given to those who are affected by the design? Which world view is really underlying the concerned design of the system S?

The formulations of the twelve boundary questions of the CSH in the 'should' mode are: Who should be the client of the system S that needs to be designed or improved? Which desired states the system S need to be able to achieve, given that it serves the respective client? What should be the success measure of the system S? Who should be the decision maker? Which components of the system S, the decision maker should control? Which resources and conditions should be a part of the system S environment? Who should be involved as the system S designer? What kind of expertise should enter into the system S design? Who should be the guarantor that the particular design of the system S will be implemented and an improvement of the system S will be provided? Who between

those affected by the design should become involved? To what extent and in what manner, a chance to release themselves from the premisses and the promises of those involved should be given to those affected by the design? On whose worldview - whether those involved or those affected by the design - should the system S design be based?

By using the boundary questions, the stakeholders should reveal the normative assumptions that enter into any design of the system. In the CSH context, there is not a design of the system that can be denoted as rational as long as its normative content is not made explicit. However, this is not the only criterion of rationality. It is necessary that those affected by the design evaluate its consequences.

The shortage of expertise and rationality of those affected by the designs is being pointed out as the main obstacle to their challenge to the planners' system designs. However, the fact is that the designs of organizational systems are based on the boundary judgements whose justification is beyond the reach of expertise. The planners, justifying their proposals on the base of their own expertise, or 'objective necessities', actually use the boundary judgements.

In order to ensure a dialog of all stakeholders, the method designated as the polemical use of the boundary judgements has been developed. This is a practical instrument that the stakeholders can employ in order to commit the planners to a reflection of the normative content of their designs, and to a rational debate about the incompleteness of their plans, even when they are not ready to do so. A polemical use of boundary judgements, as the method of debate, is necessary given that the planners (the involved) must not be the only ones who reflect on their designs. The witnesses must also discuss the planners' designs. The plans can be qualified as rational only if the agreement has been reached between those involved and those affected by the plans.

Accordingly, the CSH methodology requires an appropriate polemical employment of the boundary judgements (Ulrich, 1994, pp. 305-310). Those who are affected by the design can defend the alternative boundary judgements against the planners' judgements, and can show that: the experts' proposals are guided by the boundary judgements, the experts' knowledge and their expertise are insufficient to justify their boundary judgements, and planners and experts - endeavouring to justify their own proposals with the knowledge and expertise, in fact, use the boundary judgements in a dogmatic manner, and so disqualify themselves. The polemical use of boundary judgements provides planners and those affected by the designs an equal position for an acceptable dialogue.

CRITICAL REVIEW

In accordance with the presented conceptual foundations of the CSH, it can be pointed out that it is about the emancipatory systems development that allows a careful analysis of the systems approach basis and provides a relevant contribution to the sphere of the emancipatory systems perspective (Flood & Jackson, 1991, pp. 217-219).

The CSH is appropriate to those coercive management problem contexts in the organizations in which the sources of power can be identified. Actually, first of all, through the employment of critically heuristic categories about the sources of motivation, control, expertise, and legitimacy, the CSH reveals the real interests that will be served by the proposed design of the concerned organizational system. Then, through the polemical use of all stakeholders' boundary judgements, the CSH contributes to the organization of a rational debate about the shortcomings of the considered design.

Considering the embedded conceptual and methodological postulates, it is obvious that the CSH does not especially deal with the systems dimension but focuses on the participants dimension, specifically, the aspect of coercion. In this regard, the possibilities of using the CSH are broad. First of all, many management problem situations in organizations are characterized by coercion. Also, most of the pluralist debates can use the clarifications that have been provided by the CSH methodology. In addition, it is important that coercion, which - structurally embedded in organizations - causes more subtle and complex use of power, can not be identified through the employment of the CSH methodology.

As any other systems approach to management, the CSH can be evaluated from different viewpoints (Jackson, 2000, pp. 319-320; Jackson, 2003, pp. 226-229).

First of all, the CSH ignores certain possibilities offered by the theoretical and methodological pluralism. Actually, along with the critique of Systems Science as well as the denial of its usefulness in the organizational systems designing, an important role which instrumental reason (for example, in Organizational cybernetics) can have in planning is unjustifiably neglected. This is because a rational social action depends on both what can be done and the choice of efficient means as well as what should be done.

In accordance with the conceptual foundations of the CSH, it is considered that its relevant feature is the adoption of the corresponding, restricted notion of critique (Jackson, 2000; 2003; Midgley, 1997). Namely, the CSH allows a reflection on the ideas and values entering into any design of organizational systems, but it does not help in thinking about the material conditions for which more objectivist thinkers believe that they lead to these ideas as well as the ideas about maintaining the power. The analysis conducted in accordance with the theoretical and methodological guidelines of the CSH helps to point out such material conditions, but the respective

methodology cannot provide a research into or explanation of the nature and development of these conditions.

Due to the neglect of the relevant structural aspects of organizational systems, the CSH is particularly criticized from the standpoint of its reliance on utopian assumptions. In the conceptual framework of the CSH, the following relevant issue remains without a precise answer: Why should those involved endeavour to take into account the opinions and interests of those affected by the designs?

In this context of consideration, it is relevant to comprehend that the successful use of the CSH depends on whether there already exists a situation in which a participative debate is possible (Midgley, 1997, pp. 37-57). Furthermore, there is a danger that the CSH can - even in the conditions where an open debate is possible - introduce its own forms of coercion, because those who are characterized by a lack of self-confidence and inability of learning may be unable to engage effectively in a rational argumentation.

As a particular shortcoming of the CSH, its insufficient methodical maturity stands out (Jackson & Flood, 1991; Jackson, 2000, p. 320; Jackson, 2003, p. 228). It is thought that the CSH lacks the corresponding, practically tested methods, instruments, and techniques to support it. That is, the revelation of the design of an explored organizational system and everything that the respective design implies is enabled through the use of the twelve questions in 'is' and 'should' modes. Thereby, it is not clear in which manner integrate the acquired knowledge into the intervention.

CONCLUSION

As a relevant representation of the emancipatory paradigm, the CSH is appropriate to the coercive management problem situations in organizations in which power relations and the sources of coercion can be revealed, and deals with the following key issues: who benefits from the proposed changes, i.e. the new designs of the organizational systems in conflict situations, that is, where there is coercion and in which manner it is manifested? The CSH can - through its application - be an important means of supporting those who are affected by the decisions, but who are not included in the processes of problem solving and decision making. So, as the authentic, theoretical, methodological, and methodical development within the emancipatory paradigm, the CSH can be considered a valid framework for the improvement of critical - thoughtful and emancipatory - practice (Ulrich, 2003, pp. 325-342). Rejecting the functionalist systems thinking, and broadening the interpretive systems thinking (Jackson, 2003, pp. 226-229), the CSH pays attention to the interests and values of those who are otherwise excluded from the debate about the designs of the researched organizational systems, and who are affected and who have to

experience the consequences of the respective designs. The CSH endeavours to support the release of these stakeholders, enabling them to participate - without fear of expertise and/or power of those involved in decision making - in the debates about the shape, direction and intensity of actions and interactions that organizational systems generate, and in which they live.

As the emancipatory methodological development providing the critically heuristic support for identifying, testing, and enhancing the normative content of the organizational systems' designs, the CSH can be creatively used in structuring the corresponding problem situations in both private and public sectors. For example, the CSH has been successfully employed in the critical evaluation within the Business Process Reengineering (Flood, 1995, pp. 294-319), in the quality management in the National Health Service, (Flood, 1995, pp. 179-183), in critical dealing with the key aspects and dilemmas of Corporate Social Responsibility (Reynolds, 2008, pp. 383-395), in identifying the stakeholders in organizational projects (Achterkamp & Vos, 2007, pp. 3-14), and so on. From the standpoint of using the CSH methodology in different case studies (for example, Cohen & Midgley, 1994), it is of a particular importance that this emancipatory systems methodology cannot be considered as a substitute for other systems approaches to management, but it can be - through the contemporary critical systems thinking - used as their valuable complement (Midgley, 1997, 37-57).

Taking into account the overall presented consideration, it can be concluded that the basic hypothesis has been confirmed through the research process. Actually, considering its own conceptual framework and the resulting methodological and methodical development, the CSH, as an authentic systems methodology within the emancipatory paradigm, can be used in the creative managing of the coercive problem situations in contemporary organizations. Respectively, through: a) the critical disclosure of the normative contents of the proposed designs of the considered organizational systems, b) identification of the stakeholders to whose interests these proposed designs serve, and c) allowing those affected by the respective designs, but who were not included in their adoption, to recognize and express their own interests and values, the CSH creates a valid framework for releasing these stakeholders and improving their position.

The basic limitation of the conducted research represents the fact that the presented consideration of the conceptual, methodological and methodical dimensions of the CSH, as the emancipatory systems approach to management, has not been followed with a concrete use of this methodology in an immediate management problem situation in which the sources of coercion may be identified.

Exactly this limitation of the paper will be a subject matter of future research. In addition, the preconditions, ways and constraints of a complementary use of this methodology with the methodologies (i.e. with

their methods and techniques) from the functionalist and/or interpretive paradigm will be the particularly important area for further research.

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ЕМАНЦИПАТОРНИ СИСТЕМСКИ ПРИСТУП СТРУКТУРИРАЊУ ПРИСИЛНИХ ОРГАНИЗАЦИОНИХ ПРОБЛЕМА

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Резиме

Креативно управљање присилним проблемима у организацијама имплицира одговарајућу, еманципаторну парадигму, у којој су (у односу на остале парадигме – функционалистичку, интерпретативну, постмодерну) контрадикције у систему и конфликти између различитих група и појединаца у центру истраживања, с циљем развијања оквира у коме ће бити олакшано ослобађање стејкхолдера од утицаја постојећих, односно, предложених друштвених, тј. организационих структура. Као еманципаторни системски приступ менаџменту, Критичка системска хеуристика је примерена присилним управљачким проблемима у организацијама. Кључна питања дискутована у Критичкој системској хеуристици су: ко има користи од предложених промена или нових дизајна система у конфликтним ситуацијама, где постоји присила, како се манифестује, које су њене релевантне консеквенце. Критичка системска хеуристика настоји да омогући стејкхолдерима да открију нормативни садржај постојећег, односно, предложеног организационог дизајна, идентификују могуће алтернативне дизајне и

кроз партиципаторну дебату дођу до дијалектичког решења о томе које промене, односно који дизајн би требало да буде имплементиран.

Свеобухватно и детаљно испитивање концепцијских основа Критичке системске хеуристике, њеног методолошко-методског развоја, претпоставки, начина и домета њене примене у структурирању присилних управљачких проблемских ситуација у организацијама представља научно, друштвено и апликативно валидан циљ истраживања. Кључна хипотеза, која је кроз истраживање потврђена, јесте да Критичка системска хеуристика, као методолошки исказ еманципаторне парадигме, може – с обзиром на своје концепцијске основе и методолошко-методски развој – бити употребљена на научно заснован и практично користан начин у управљању оним присилним проблемима у организацијама у којима извори и релевантне консеквенце присиле могу бити идентификовани, пружајући креативну подршку унапређивању позиције посебно оних стејкхолдера који нису били укључени у процесе решавања проблема и одлучивања, а који су погођени имплементацијом утврђених промена, тј. системских дизајна. Научни метод употребљен у истраживању је критичко системско мишљење, обавезано на критичку свест (о снагама и мањкавостима било ког истраживачког инструмента, па и методологије Критичке системске хеуристике), унапређивање процеса структурирања присилних управљачких проблема у организацијама и плурализам (давање легитимитета различитим интерпретацијама истраживане управљачке проблемске области у организацији и омогућавање комбинованог коришћења различитих истраживачких инструмената).

Ослањајући се на одређене концепцијске фундаменте (концепти у синтагми Критичка системска хеуристика, скуп синтетичких а priori концепата укључених у процес генерисања знања, гранична просуђивања, дванаест критичкохеуристичких категорија утврђених у односу на разлику између оних који су укључени у одлучивање (клијент, доносилац одлуке, планер) и оних који су погођени одлукама, али нису укључени у одлучивање (сведоци), квазитрансценденталне идеје о системима, моралу и гаранту), развијена је методологија Критичке системске хеуристике, која се састоји од четири фазе: увођење димензије сврховитости; одређивање принципа ослоњених на квазитрансценденталне идеје о системима, моралу и гаранту; просуђивања о дизајнираном систему треба учинити транспарентним; спровођење партиципативне дебате између свих стејкхолдера. У оквиру методологије Критичке системске хеуристике развијена су два метода: Листа дванаест граничних питања, као подршка настојањима да се нормативне претпоставке уграђене у дизајне организационих система учине транспарентним, и Полемичко коришћење граничних просуђивања, којим се треба осигурати дијалог између оних укључених и оних који су погођени дизајнима, односно, омогућити постизање обострано прихватљивог споразума.

У примени, Критичка системска хеуристика може креативно подржати процес дизајнирања организационих система; конкретно, кроз коришћење критичко хеуристичких категорија о изворима мотивације, контроле, експертизе и легитимности, омогућено је откривање интереса којима ће служити предложени дизајн истраживаног организационог система, а кроз полемичко коришћење граничних просуђивања свих стејкхолдера, доприноси се организацији расправе о ограничењима разматраног организационог дизајна и отвара простор опредељивања алтернативних дизајна. Истовремено, као кључне мањкавости Критичко системске хеуристике издвајају се: игнорисање могућности које нуди теоријски и методолошки плурализам, ослоњеност на извесне утопијске претпоставке, недовољна методска зрелост.

Сходно утврђеним истраживачким резултатима, као две – научно и практично – релевантне области будућих истраживања могу бити издвојени: а) предуслови,

начини и ограничења комплементарног коришћења методологије Критичке системске хеуристике са методологијама које припадају другим парадигмама и б) непосредно коришћење методологије Критичке системске хеуристике у одређеној управљачкој проблемској ситуацији у конкретној организацији у којој извори и резултанте присиле могу бити идентификовани.