**Learning organizations and organizational learning through the pragmatist lens**

**Introduction**

Learning organizations and organizational learning have been extensively studied over the course of several decades. As is the case with all other disciplines, theory and practice are closely intertwined and mirror each other through their mutual development. Initially, an individual or a group has an experience and documents it. Then someone tries to construct a coherent body of knowledge out of that information by developing a theory. A theory is then tested in practice and either verified or sent for further refinements. Groups of people try it in practice, notice additional instances that should be considered and encounter new obstacles to its implementation, contributing to further theory development. In that way, through dynamic interaction between theory and practice, both are continuously upgraded, refined and developed on the basis of new contexts and new contingencies.

Even though the Learning Organization journal primarily deals with contributions that are theoretical in nature and are the result of empirical testing, it is also worth taking a closer look at the individuals who have contributed to the body of knowledge in the field of learning organizations/organizational learning through their practical work. That is why, in this issue, learning organizations and organizational learning are examined by the professor Silvia Gherardi who is famous for her practice-based perspective. The ideas by Arie de Geus, who is known not only as a famous practitioner and academic, but also as the first person who suggested the idea of the learning organization, are presented as well. Hong (2020) offers perspectives of developing learning organizations through the ethical lens by presenting ideas by Robin Snell, a thought leader that has been contributing to this stream of literature for more than four decades. Ingvaldsen and Engesbak (2020) offer a special view on the relationship between organizational learning and bureaucracies and suggest that bureaucracies can serve as a vehicle that enables large-scale collaboration and learning. Ruchi and Stothard (2020) also refer to hierarchies and theoretically examine effects of team power asymmetry on team learning. Teamwork and team learning are also a characteristic of large social projects such as those of building ‘smart cities’. In his book review, Hong (2020) examines challenges of building a smart city in Portugal as described by Edmondson and Reynolds (2016). Learning should be balanced by unlearning and relearning to enable progress so Casey *et al.* (2020) suggest some avenues for future research in this regard calling for practitioners’ input.

**The legacy of Silvia Gherardi**

In this issue, learning organizations and organizational learning have been examined from the standpoint of the professor Silvia Gherardi, who has been at the forefront in the learning organization field for over four decades. Her practice-based perspective was especially pronounced in the interview conducted by Cuel (2020). In her paper, Cuel (2020) provided an overview of Gherardi’s scientific contribution and discussed the evolution of her work in social sciences. Coming from the Italian background, Gherardi considered learning and knowledge as social and cultural phenomena, contributing to differences in definitions and perspectives.

Her conceptualization of organizational learning is especially useful in that she views it as a metaphor in which an organization reflects on experiences and learns, which results in the stock of knowledge, skills and expertise. Gherardi puts emphasis on the importance of language and symbols in organizational learning and formulating a theory about it. In that way, she advocates departure from the previously dominant classical view of organizations acting according to the principles of rational choice. Such principles could not be applied during organizational learning as it entails experimentation and as such the process of trial and error, which leads to valuable insights on how to proceed. Even though this process has the potential to significantly improve organizational effectiveness, it, by definition, could not be described as efficient. However, practitioners should note that learning occurs through errors and failures as well, as they not only provide valuable feedback, but could also point to completely new frontiers, perspectives and potentials of development, albeit in somewhat different settings and operating from different assumptions or mental models.

The most thought-provoking idea suggested by Gherardi is that learning is ambiguous and culturally dependent, which prompts the debate whether it could be fully conceptualized and theorized following the principle of approach generality. Such a view has also been offered by Morgan (1986), who stated that organizational behavior could not be explained by a single theory but by introducing different perspectives, which could also be described as metaphors, as a basis of organizational reflection (in terms of theory) and organizational action (in terms of practice). Biological approach could be introduced next in that organizations, as collections of individuals, could be explained as separate entities – organisms that operate on the basis of culturally defined codes accepted by consensus. Such entities develop on the basis of individual and collective or organizational learning in that, according to Gherardi, learning and knowing could not be strictly divided.

That is quite logical as they could only be explained as a cycle in which some knowledge prompts learning, which leads to new insights and knowledge, which prompts further learning. However, for any learning to occur, a proposition or an assumption should be designed to stimulate further inquiry. In that way, Gherardi also identifies organizational learning as a technology of organizational intervention but also as a dynamic capability. In organizations that learn, actions and change are continuously “becoming” through social constructions governed by the principle of normativity in the pursuit of shared goals and on the premises of the socially accepted behavior, taking into consideration multiple stakeholders and their interests. In that way, learning organizations and organizational learning could appear elusive, inapprehensible and difficult to subject to scrutiny, which is well-known to practitioners and should not be feared as wrong or detrimental but as an expression of the mystery of life and its development.

**True learning organization sage – Arie de Geus**

Robinson (2020) provided an overview of the life and work of Arie de Geus, a famous practitioner and academic who is known as the first person that suggested the idea of the learning organization. To understand the contribution by de Geus, it is especially important to understand the context in which his ideas emerged. It is, therefore, important to note that management in general and leadership in particular were under a strong influence of the military experience after WW2 in terms of their orientation toward command and control. Knowledge transfer was designed in terms of teaching but also as a process of command and control. However, de Geus noted that companies such as Shell managed to maintain their sustainability by being attentive to environmental conditions and by translating changes into effective action. However, these activities were performed by senior managers and de Geus labeled that process “institutional learning” (de Geus, 1998) because it was management that changed their mental models or assumptions about all key business constituents – of the market or customers and competitors, and of their business model. However, as an insider to the company, de Geus suggested institutional or organizational learning by developing scenarios as stories to which managers could personally relate so that they could change their own mental models and then start organizational change as a process of creating “memories of the future”. This shows that de Geus was primarily a practitioner who was in pursuit of modalities that could contribute to organizational viability and for that purpose he later joined like-minded individuals and established with them MIT Center for Organizational Learning and Society for Organizational Learning (SoL).

The main message for every practitioner is the fact that organizational learning should never be about institutional learning as a process of indoctrination of existing principles and control but a context that enables and supports experimentation with ideas and perspectives. In other words, organizational learning is not learning what is already known but a leap into the unknown to discover what could be known and made possible. Practitioners should be aware of the fact that this process is by no means linear; it could be convoluted and lead to quantum leaps into previously unimaginable perspectives. For that matter, de Geus offered more suggestions. As with individuals and individual learning, every organization should first be sensitive to environmental stimuli as well as be aware of their existence and nature. Organizational identification is also key, expressed as a cohesion of organizational value system which creates a true community and something which de Geus called “organizational persona”. De Geus also advocated the importance of “ecology” or the development of relationships on the basis of tolerance and decentralization. These conditions could enable organizational ability to regulate and govern its own evolution. However, practitioners should keep in mind that organizational identification enables organizational members to gradually adapt their own personal mental models in the way that planning and decision-making, even when done by management, become incentives for learning. It is human capital that drives the organizational prosperity so it is key to stimulate individual development through the process of learning for organizational learning, as the learning of the collective, to take place.

De Geus was also known to challenge the dominating view of the neoclassical theory of the firm, which suggests that the purpose of the company is to generate profits for shareholders. It was advocated by Harvard Business School and especially by its scholar Michael Jensen, one of the most sanguine advocates of the agency theory of management according to which management’s sole duty is to maximize shareholder value. Even though it does not specify when profits should be maximized, its postulates are interpreted as profit-maximizing attempts in the short-run when a company is conditioned by the existing technology. This perspective stimulates the short-term orientation with the emphasis on quarterly and annual profit margins which serve as the underlying mechanism for compensations of incumbent managers that also usually last a few years. As organizational learning implies time of experimentation, risk-taking and failure, which are known to generate costs without guarantees for success and future positive returns, it is often neglected as a source of disorder/chaos or, at best, executed through managerial (top-down) intervention, which Kululanga *et al.* (2001, p. 23) called “forced organizational learning”. In this regard, de Geus, as a reflective practitioner with a lot of experience, especially warned of the so-called “hubristic leadership”, which is expressed in aggrandizement and sycophantic tendencies, which severely undermine collective inquiry. However, if organizations do not go through the process of individual learning, knowledge sharing and true process of organizational inquiry in which organizational members ask questions such as “why” and “why not”, organizational prospects for survival could become utterly questionable.

**Learning organizations through the ethical lens**

In the conditions of “hubristic leadership”, as suggested by de Geus (Robinson, 2020), as well as psychopathic and narcissistic leaders (Krenn, 2013), it is important to consider the development of learning organizations through the ethical lens. Hong (2020) offers perspectives in this regard by interviewing Robin Snell, a thought leader that has been contributing to this stream of literature for more than four decades. First and foremost, Snell (Hong, 2020) believes that true learning organizations foster authentic dialogue, reveal controversies and make information and knowledge available to organizational members. Access to information and knowledge could bring about disagreements which should be maintained at the healthy level and conducted in a constructivist manner for the purpose of mutual development. It should be noted that integrative or cooperative solutions (also called win-win solutions), which benefit stakeholders or produce the greatest amount of good for the greatest amount of people, could happen only through the free flow of ideas, their honest and constructive evaluation and synthesis on the basis of accepted assumptions or mental models as well as underlying values.

In this regard, Snell (Hong, 2020) emphasizes the importance of the social and implicit contract between employees and management by which employees could count on job and income stability by considering and taking advantage of learning and development opportunities that they encounter. In addition, employees should actively seek learning opportunities that could enhance their own personal mastery but also contribute to organizational viability. In that way, it should be noted, the employee-firm relationship ceases to be purely transactional in nature but is transformed into a transformational relationship that yields mutual benefits. Employees might still invest their time, knowledge, skills, creativity, commitment and status that contribute to organizational legitimacy for personal income but in that process they also gain further knowledge and experience, followed by intrinsic benefits such as recognition, sense of achievement and self-actualization, which they invest in value creation on a new level. In that way, both employees and organization as a system are continuously transformed on the basis of learning and implementing knowledge in the value-creation process.

Ethical considerations are inevitable part of this process. In this regard, Snell (2001) offered ten moral foundations of learning organizations. Snell (Hong, 2020) especially emphasizes the importance of mutual respect and care. This underlying value enables other derivations. One of them is performance appraisal that is commensurate to contributions and challenges. The other is stakeholder management in that an organization should respect stakeholder interests and expectations and continuously respond to them in an open and constructive manner as well as ensure respect of human rights, especially the right to free speech. Management should address all stakeholders, both internal and external, with humility and timely admit mistakes if they occur. Management is also responsible for nourishing the “moral tradition” (Hong, 2020, p. X) supported by adequate storytelling and compassion in times of trouble. However, “moral tradition” should also be supported “from below” in terms of allowing employees to offer opinion and suggestions regarding strategic decision-making. In that way, it should be noticed that Snell (Hong, 2020) advocates the humanistic approach to organizational behavior. If it is known that change is and could only be initiated from the top, and if unfavorable leadership characteristics are brought to the forefront, it is clear why learning organization initiatives are not more widely spread. However, it should not be denied that the role of employees is equally important. Active learning as well as task and contextual performance was found to be positively related to work engagement in employees high in conscientiousness (Bakker *et al*., 2012). It is up to every individual to honestly estimate their own level of conscientiousness and therefore the potential for their successful empowerment within learning organizations.

**Are bureaucracies an impediment to learning?**

Structural problems in organizations are often left unsolved. For that matter, Ingvaldsen and Engesbak (2020) offer a special view on the relationship between organizational learning and bureaucracy and suggest an alternative view contrary to common belief that bureaucracies need not be an obstacle to learning, especially organizational learning. Practitioners should note that, in this paper, bureaucracy has been examined as a vehicle that enables large-scale collaboration and not as an instrument of control, for which it is probably more prominent.

Weberian bureaucracies and hierarchies are famous for their desired results such as order, uniformity, predictability and stability, which, when routine work is in question, leads to increases in efficiency and productivity. However, bureaucracies are notorious for their disabling influence on experimentation and change. Experimentation, learning and change are at the core of innovations and hence obviously antagonistic to the principles of bureaucracies. However, it is an irrefutable fact that in many industries large incumbent companies that have also adopted the principles of bureaucracies, such as centralization of decision-making, formalization and standardization, successfully develop new innovations in terms of products, services and technologies (Lager *et al*., 2013). It seems that some bureaucratic characteristics are not that inhibitive to innovations after all.

In numerous attempts of trial and error which accompany innovation processes, when organization has standardized its work practices, results and deviations are carefully monitored, measured and documented. New propositions, in terms of new products, services or technology, are systematically tested and the results verified. Such information is fed into information systems so that work processes are revised and tried anew until a desired result is reached. In that way, standardization could reduce experimentation risks, enhance learning and promote more productive resource allocation.

As innovations are developed and performance is improved in various respects, it is clear that organizational learning must occur to make it happen. Organizational learning could be understood as “the process of improving actions through better knowledge and understanding” (Fiol and Lyles, 1985, p. 803). Flores *et al.* (2012, p. 641) identified organizational learning as key to “an organization’s capability for continuous change and renewal”. Change could be reflected in the introduction of new systems and processes, changes in policies, tactics and strategies and other organizational behaviour and routines. It could be concluded that bureaucracy rigidities should not be considered impediments to organizational learning after all. However, the question remains how individuals and groups are given freedom and opportunity to experiment and challenge established routines and mental models.

Bureaucracies have also been identified as instruments for coordinating organizational collective activities (Donaldson, 2001). Since bureaucracies are implemented in large systems, they are can be used to coordinate large-scale activities. Large systems are organized by establishing many smaller units that are managed semi-autonomously (such as business functions) or autonomously (such as divisions). In such units, innovations can be fostered by establishing a culture and the leadership style that promote them. In that way, by establishing smaller units within a larger system, companies can emulate the conditions present within smaller companies, especially with regard to their entrepreneurial spirit and dynamics. However, characteristics of bureaucracies could prove quite useful. For example, the characteristic of formalisation is important in innovation processes. R&D activities call for extensive testing and verification of new value (products, technologies), which is supported by formalized processes (Ben-Menahem *et al.*, 2016).

In addition, Keum and See (2017) found that hierarchy of authority is detrimental for idea generation, but it can be beneficial for idea screening and during the selection phase of innovation. The explanation is interesting and is related to the fact that hierarchy reduces personal bias or the tendency that people give preference to their own ideas versus the ideas of others, meaning that they influence individual behaviour and constrain such negative tendencies. However, the authors also found that hierarchy of authority negatively influences organizational ability to generate internal behavioural variation, which is the foundation for learning and innovation. Practitioners could take advantage of their more formal organizational setup in the way to ensure anonymous generation of ideas (written brainstorming could serve in this regard). In case ideas are generated externally, such as by using crowdsourcing, practitioners could also benefit from a more formal organizational structure and hierarchy of authority in idea selection.

As already noted, hierarchy of authority could hinder idea generation and learning, especially exploratory learning. However, since large organizations should be organized by using hierarchical elements, it is important to determine on which assumptions they are based in practice. For instance, hierarchies could be established as a means of control with the purpose to promote stability, predictability and reliability of individual and organizational behaviour. On the other hand, hierarchies could also be implemented as an instrument of coordination of numerous business processes and large workforce. The latter aspect was especially emphasized by Ingvaldsen and Engesbak (2020) in regard to the process of collective learning at a large scale. They emphasized that innovation processes require coordination of highly specialized knowledge and learning processes on multiple levels. Since technological and operational knowledge has become very complex, specialized and deeply differentiated, collaboration of various professionals and combination of their expertise is essential to produce new value. Large organizations, consisted of professionals in different areas, could benefit from such heterogeneity only if it is harnessed. In addition, when heterogeneous knowledge is further accumulated by virtue of collaborative efforts, it promotes further specialization and diversification.

However, collaborative efforts are mostly influenced by the leadership style within units of large systems. In that way, R&D units are organized and managed more loosely as they deal with exploration of new knowledge and its useful implementation. However, their cooperation with other departments, business operations in particular, is crucial for marketization of inventions or true innovation that is commercialized. In that way, large system coordination of efforts should primarily be considered as a question of leadership coordination in which beneficial hierarchical characteristics could be used as welcome facilitators of coordination and collaboration. Practitioners’ input is welcome to further study these relations.

Ruchi and Stothard (2020) also refer to hierarchies and theoretically examine effects of team power asymmetry on team learning. As noted previously, better and often formal coordination mechanisms in hierarchies can improve decision-making. However, they are based on clearly defined roles and power difference between organizational members resulting in power asymmetries. Members lower in hierarchy are likely to be more sensitive to the existing power-based roles (Greer *et al*., 2018), preventing them to freely and fully participate in discussions and dialogue. This approach could be based on subjective impression as well as on more objective, hierarchy-based conditions. By the same token, members higher in hierarchy could be inclined to disregard feedback from those hierarchically below them or give it less attention, further promoting power asymmetry. It is quite obvious that these circumstances could not sustain effective team learning and knowledge sharing. Practitioners are invited to examine if and to what extent these propositions hold true in their own environment both consciously, meaning that is the intended behaviour, and unconsciously, meaning that the behaviour is maybe not intended but is governed by hierarchy-imposed personal auto-pilots.

Even though previous statements have become mainstream ideas in organizational theory, Ruchi and Stothard (2020) introduce other contingencies to challenge the existing relations. They suggest egalitarianism as a condition for team learning and further explore how in the conditions of adversity structurally imposed power differences could be overcome to produce an environment of egalitarianism that could stimulate inquiry, dialogue, idea generation, knowledge sharing and hence team learning, which could help overcome adverse circumstances. Egalitarianism can be referred to as a state and the feeling of general and interactional equality contributing to feelings of mutual respect (Kozlowski *et al*., 1996). Egalitarianism is especially important in team learning as it is a process in which team members engage in a dialogue and try to suspend their assumptions in order to think together (Senge, 1990). Dialogue refers to open discussions of different possibilities, contingencies and mistakes and is, in and of itself, a great learning opportunity. Egalitarianism or equal treatment regardless of resources, roles and responsibilities, can contribute to greater openness and commitment in joint inquiry and idea sharing so that everyone’s ideas are given equal or almost equal attention and value. Differences could still be based on personal affinities and inclinations.

Market frictions and crisis usually leave small businesses vulnerable, while large systems have a greater likelihood of survival. That is why practitioners are challenged to look for ways to support them by complex organizational forms while still promoting entrepreneurial behaviour. Power asymmetries are inevitable but so are innovation and learning. Hardships of any kind are also inevitable. What’s more, they occur in many shape and form requiring changes from small adjustments to major system alignments. Organization-wide participation and commitment are indispensable in such conditions, followed by learning on all levels: individual, team and organizational. In the conditions of both minor challenges and major threats, egalitarianism could strengthen the sense of belonging and commitment. In times of risk, uncertainty and ambiguity, organizational members could be more likely to forget about their ranks and look for valuable information regardless of their origin. New skills and capabilities of lower-ranked individuals could be discovered leading to new approaches and perspectives. Even though members that belong to different hierarchical levels could have different perspectives, information, knowledge and experience, in modern hectic and crazy world thinking out of the box is often the key to survival. Feelings of complacency and hubris are easily shaken and should be left outside of any organization, especially large ones. If anything, for the sake of survival.

Teamwork, team learning and innovations are not only the characteristic of organizations but also of large social projects such as those of building ‘smart cities’. In his book review, Hong (2020) examines the challenges of building a smart city in Portugal as described by Edmondson and Reynolds (2016). That project required multiple stakeholder and cross-industry collaboration and integration of a wide range of values, models, ideas and skills, making it a big-teaming project. Edmondson and Reynolds (2016) explained complexities and socio-political challenges in the project and concluded that many things have to change in a coordinated manner leading to innovations. That is why for this type of innovation, they coined the term “audacious innovation”. Practitioners could be further inspired by this book to develop their own “audacious innovations”.

**How to forget what needs to be forgotten and how not to forget?**

Forgetting bad memories is difficult even in personal life. However, every individual also often regrets to have forgotten things that could still be useful or that suddenly become useful. Organizations are no different. Organizational forgetting is currently popular and under-researched area in the field of learning organizations/organizational learning. In this issue, Casey *et al.* (2020) suggest some avenues for future research. Until research results arrive, practitioners could examine in their organizations many such suggested problems related to the problem of organizational forgetting. For instance, it is important to identify how employee turnover affects knowledge depreciation. This problem could be especially significant in labor-intensive industries in which knowledge is associated with particular individuals and is lost when they leave (Benkard, 2000). These industries are especially affected by high turnover rates and higher risk of knowledge loss. However, knowledge loss and organizational forgetting is also very context dependent. That is why it is important to document who leaves and what knowledge, especially that facilitated by the organization, an individual possesses. Practitioners should be careful to ensure that a knowledge transition process takes place in which the departing individual transfers essential knowledge to their successor(s).

Another important aspect is time. With time everything loses value so knowledge is likely to depreciate as well. Practitioners should be careful in identifying which knowledge is more likely to lose its value due to obsolesce and establish mechanisms so that is it updated regularly. Knowledge could also be accidentally lost with time, so the issue of knowledge storage should be addressed by practitioners as well. Managerial role is also very important. That is why practitioners should be aware of the power and political dynamics present in their organization and its influence on knowledge acquisition, knowledge transfer, and learning and knowledge renewal. Managerial agency is important regarding accidental and purposeful forgetting. It is also important to identify which behavioral routines have changed so that knowledge is not lost before its value is evaluated and it is stored adequately. In this regard, it is also important to identify and define possible unlearning and relearning processes in case such knowledge is still rendered valuable to the organizational value creation.

The role of technology is also pertinent to the organizational forgetting problem. Research is divided regarding its role: Argote (2013) found that technological tools prevent organizational forgetting and Daghfous *et al.* (2013) found that they cause it. That is why practitioners should pay more attention to the role of their own technological tools in organizational forgetting in general and regarding specific contexts such as labor-intensive work or networking. Practitioners should keep in mind that individuals are important knowledge repositories as they hold the awareness that a certain knowledge exists and how it could be found. In addition, knowledge has less likelihood to be accidentally forgotten if it is shared in networks. Droege and Hoobler (2003) found that networking strategies, such as strategic coordination among units and networks, are more effective than codification in preventing knowledge loss. Transfer of employees to different departments or locations could prove detrimental in this regard (Ward and Wooler, 2020) as knowledge becomes harder to find and retrieve (Anderson and Lewis, 2013). Mergers and acquisitions could also affect forgetting and unlearning much like the influence of external stakeholders such as professional associations. Regardless of the context, contingencies or stakeholders, practitioners should always try to apply the systems approach and not let these processes be at mercy of random chance.

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