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Patricia Genoe McLaren, Albert J. Mills, Terrance G. Weatherbee

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Matthias Kipping, Behlül Üsdiken
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Turning how and where?
The potential for history in management and organizational studies

Matthias Kipping and Behlül Üsdiken

Both in our own writing and in our institutional efforts, namely through a standing working group at the European Group for Organizational Studies (EGOS), jointly organized with Lars Engwall, we have tried to help promote a larger role for history in management and organization studies. And we welcome and support all efforts in the same direction, including this Companion. Indeed, a lot has been said and done since the early calls for linking management and organization studies and history, namely Zald’s (1990, 1993) and Kieser’s (1994) essays. At the same time, among those advocating more history or even an ‘historic turn’, there is still not much consensus on how this should be done – and where such a turn should lead us or, put differently, what exactly the contribution of history might be (Üsdiken and Kieser, 2004). And while plurality is generally positive and should be welcomed, we argue that the multiplicity – and sometimes vagueness – of aims and approaches also hampers debate and a possible movement towards broader consensus. Moreover, we also believe that the juxtaposition between management and organization ‘science’ and (business) history, which underpins much of the calls for more of the latter, might be counterproductive and block some possible directions for history finding a larger and at the same time useful place in research on management and organizations.

In the remainder of this commentary, we will briefly discuss each of the following: (i) the origins and the nature of the early calls for more history in management and organization studies, which we suggest were a reaction to the increasingly dominant timeless and universalist theorizing on management and organizations since the 1960s; (ii) the divergence that became apparent in the ways to engage with history in the 2000s, which, in our view, has somewhat obscured the explicit or latent anti-scientistic/anti-positivist position of most recent supporters of management and organizational history; (iii) finally, moving beyond recent suggestions on how to bridge the now taken-for-granted gap between history and management and organization studies, we argue that there is promising and largely unexplored potential in accommodating, though not fully embracing, the dominant (social) science paradigm.

Discontent with ahistorical theorizing

As mentioned above, Zald’s and Kieser’s essays from the early 1990s are often credited with providing the initial impetus for the revival of interest in connecting management and organization
studies with history. It was not that there was no prior reference to history or use of historical research, even after management and organization studies took the scientistic route (see Üsdiken and Kipping, 2014). There was, of course, Chandler (1962) as well as ensuing research of the same genre (e.g. Fligstein, 1990); and there were the sporadic journal articles in the US-based literature, which pointed to the value that might be derived from taking a historical perspective or doing historical research (e.g. Goodman and Kruger, 1988; Lawrence, 1984). There was management history too, which had been around for quite some time as a recognized sub-specialty within the American business school environment, though pushed to the margins already by the 1980s (Üsdiken and Kipping, 2014; see also Marens, Chapter 7, this volume).

What distinguished Zald and Kieser was their explicit call for a greater engagement with history. Zald had a broader agenda though. His plea involved developing closer links not only with history, but with humanities at large, including literature and philosophy. In his view, such links would help to shift management and organization studies as an ‘applied discipline’, from an ‘engineering’ to an ‘enlightenment’ model. With this distinction, he was pointing to the predominant ‘engineering’ conception of the discipline, whereby the main aim was defined as developing solutions to managerial problems. What Zald (1993: 514) sought with the ‘enlightenment’ model was a re-definition, where the ‘goal is education for public and civic participation, not necessarily for specific problem solving’. For Zald strengthening the humanities base of the discipline was geared towards this particular purpose. Part of his emphasis on the humanities also had to do with pointing to what he saw as the ‘limits’ of using the natural sciences model not only in studying organizations but also in other social sciences, such as sociology (see also Zald, 1991). It is important to stress here, however, that Zald did not advocate abandoning the science orientation. For him the question was how to “combine a positivistic program of theoretical and empirical cumulation with the enriching possibilities of the humanities” (Zald, 1993: 516). His stance was mainly against timeless general models. In this vein, the roadmap that he charted included four possibilities for “combining history, theory, and the study of organizations”: (i) a “history-for-itself” approach with some concern for generalization; (ii) history used as a basis for testing “nomothetic propositions”; (iii) developing “historical theories of organizations” where outcomes are explained by prior events or processes and finally, as his preferred way, (iv) using historical and comparative analyses to account for the historically specific features of organizations (Zald, 1990: 102–4).

Although developed independently of Zald’s writings (as indicated by the absence of references to his work), Kieser’s (1994) appeal for returning to Weberian roots and re-engaging with history was in many ways similar. For him too, recourse to history was not intended as a replacement for organization theory, but rather as a way of enriching organizational analyses. The latter could be achieved, Kieser (1994) thought, by bringing history into internationally comparative research, studying past developments to account for present-day organizational arrangements, and putting current theories to the test in historical contexts.

Zald’s and Kieser’s calls came at a time when two disparate sets of currents had developed within management and organizational research, though with a differential hold on the two sides of the Atlantic (see Üsdiken, 2010 for a review). On the US side, research was becoming longitudinal with the advent and consolidation of organizational ecology and neo-institutionalism. The former was at the forefront as the focus was on histories of organizational populations, though coupled with strong universalist and scientific aims. Institutionalist research became more oriented towards process and history only when the interest began to shift towards studying institutional formation and change (see Kipping and Üsdiken, 2014 as well as Üsdiken and Kipping, 2014 for reviews; also Zald, 1996). In parts of Europe, particularly in the UK, management and organization studies had developed along totally different tracks. The reaction to the
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scientific/positivist approach dominant in the USA initially took the form of labour process theory and an interpretivist orientation, the former having closer links to history (Kieser, 1994). A shift from labour process theory towards critical management studies was then to follow coupled with the rise of postmodernism (Rowlinson, Stager Jacques, and Booth 2009; Üsdiken and Kipping, 2014; Weatherbee, 2012). However, none of these so-called ‘alternative’ perspectives, namely, the interpretivist, critical, and postmodern, were particularly attentive to history at that stage, perhaps with the exception of the postmodernists who sometimes followed Foucault’s archaeo-genealogy – an approach considered problematic in its view of history though (see Rowlinson and Carter, 2002).

Nonetheless, the divergence of developments on the two sides of the Atlantic in the 1980s and the 1990s did provide the background for more pronounced calls for greater emphasis on history as well as the different ways in which history and historical evidence were actually employed in empirical research. They also set the foundations, however, for the emergence and persistence of divisions as to how management and organization studies should engage with history.

**Juxtaposing history and social science**

The quest for greater engagement with history after the turn of the century developed along three main lines. These originated in part from the ontological, epistemological, and methodological divisions mentioned above, which had already taken shape within the management and organizational literature (see also Üsdiken and Kieser, 2004) as well as within history itself (Durepos, Chapter 12, this volume). These approaches all stressed the fundamental differences between ‘history’ and the dominant social scientistic paradigm in management and organization studies – even if they differed in the degree to which they proposed moving away from the latter.

Thus, largely remaining loyal to Zald’s and Kieser’s aspirations, some have been searching for ways in which history could be integrated into management and organization studies without necessarily abandoning the social scientistic aims of the latter. There were suggestions, for example, for a ‘historical organization theory’ that would allow addressing the temporal nature of organizations (Leblebici and Shah, 2004). Likewise, evolutionary theory has been proposed as a framework that could combine scientistic generalization with the narrative orientation in history (Lippmann and Aldrich, 2014). But these have been exceptions in what has been a fairly widespread attempt to use history to move away from the dominant (social) science paradigm. A second approach, and most radical in this respect has been the call for an ‘historic turn’, which seeks to transform management and organization studies by turning away from social science and turning instead to history (but not to business history) and to theories of history (Clark and Rowlinson, 2004). This quest for reorientation came not only as a reaction to the scientization in management and organizational studies but also called for a ‘deconstructionist’ approach to history (Rowlinson and Hassard, 2014; Rowlinson, Stager Jacques, and Booth, 2009; see also Coraiola, Foster, and Suddaby, Chapter 15, this volume). In the third approach, the main concern has not been to seek integration or a full-scale rejection. Here, authors have pointed to the benefits that could be derived from employing history as an empirical method, positioning history as one of the alternative methodologies that could be used within a particular domain or theoretical perspective in management and organization studies (see, for example, Ingram, Rao, and Silverman, 2012). Typically, history is classified as one of the qualitative methodologies, which can be utilized as a narrative or analytical narrative. It thus enables the adoption of a social constructionist and subjectivist approach to the phenomena under study (Suddaby and Greenwood, 2009; Suddaby, Foster, and Mills, 2014).
Despite their differences, all three of these approaches have juxtaposed history and organization studies, often portraying them as ultimately incommensurable. Even Zald (1990: 102), the early protagonist of the integrationist approach, saw the combination of history and the theoretical study of organizations as a “large methodological issue”. More recently, Rowlinson and Hassard (2013), for instance, compare what they called ‘historical neo-institutionalism’ and ‘neo-institutionalist history’, highlighting in particular the differences in terms of the more formal methods applied by historical neo-institutionalists and the recourse to primary (rather than secondary) sources by neo-institutional historians. More broadly, Leblebici (2014: esp. 74) contrasts ‘organizational theory’ and ‘business history’ in terms of their ‘cultures of inquiry’ and their ‘types of understanding’ showing, based on Runciman’s (1983) categories, how they differ significantly in terms of reportage, description, explanation, and evaluation, stressing namely the historians’ insistence on the uniqueness of events and their causes as well as the subjective nature of meaning (attributed to the phenomena by both historical actors and current observers). Rowlinson, Hassard, and Decker (2014) are even more explicit about the differences between history and organization theory, identifying three ‘epistemological dualisms’ in terms of explanation, evidence, and temporality. This leads to a distinction between ‘narrative organizational history’ based on periodization and verifiable documentary sources and ‘historical organization theory’, which involves the analysis of constructed data with a constant chronology. Others have developed similar dichotomies – though perhaps not quite as categorically (see, for example, Ingram, Rao, and Silverman, 2012; Wadhwani and Bucheli, 2014).

How much this usually implicit consensus regarding the opposition if not incommensurability between the historical and the social scientific approaches has taken hold in the literature (despite the variation in the opinions about what role history could and should have in research on management and organizations) can be seen in the recent suggestions about how to bridge this gap. Greenwood and Bernardi (2014), for instance, have explicitly argued against trying to combine the two disciplines. Although they attempt to show that the epistemological and methodological boundaries may not be as rigid as they are often made to be, they still believe that the barriers are not easily surmountable. In their opinion therefore, the aim should not be to seek integration but rather to search for avenues of cooperation among historians and management and organizational researchers. Likewise, Leblebici (2014), in the essay we referred to above, has proposed improving the relationship between (business) history and management and organization studies not through an ‘interdisciplinary’ but a ‘transdisciplinary’ approach. This, he argues, will (i) not be privileging any one of the two disciplines, (ii) allow each of them to maintain its distinctive identity, and (iii) create opportunities for building on the strengths of each. In his view, the benefits of such a transdisciplinary approach will be obtained if both sides are willing to accept their dissimilarities, if debate is moved from methodological differences to mutually interesting research questions, and if publication outlets can be created that would be open to problem- rather than discipline-driven research. For Leblebici (2014) such an approach would not only add to both disciplines but also enhance ‘relevance’ by addressing changes in managerial problems over time.

This apparently now taken-for-granted juxtaposition is understandable, given the origins of the call for more history in an environment dominated by the, as Zald called it, ‘engineering’ or science paradigm. But management and organization studies have evolved (Üsdiken and Kipping, 2014) and there is now more history than ‘meets the eye’, as we have shown in detail elsewhere (Kipping and Üsdiken, 2014). We would therefore suggest that management and organizational history do the same and look for ways to reconcile with social science – while maintaining its own plurality and without fully espousing all of the latter’s assumptions or methods.
Moving forward: time for reconciliations?

Thus, to repeat, we do not believe that the juxtaposition of history versus social science is helpful at this stage of development and neither do we think that history should be confined as one particular method within the social sciences. There are actually many different ontological, epistemological, and methodological positions within the history discipline itself (Decker, Kipping, and Wadhwani, forthcoming) – a fact that those referring to it within management and organization studies at times ignore, as has been pointed out by Coraiola, Foster, and Suddaby (Chapter 15, this volume). Thus, we agree with Rowlinson, Hassard, and Decker (2014: 268) when they say that “it makes no sense to try to find a unified ontological or epistemological foundation, let alone a unitary ‘historical method’ for organizational history”.

Yet, we should also stress that a corollary of this position, for us, is acknowledging the legitimacy and potential contributions of the (now) many different ways of engaging with history and making use of historical research. The position that we take accords with the plurality (fragmentation if you like) that has come to characterize the field of management and organization studies at large, emanating from the divergent orientations that, as we mentioned above, appeared in the 1980s. Indeed, the heterogeneity that we observe in historically orientated research is a reflection and extension of the diversity of ontological, epistemological, and methodological orientations already existing within the field of management and organization studies (see, for examples of these alternative perspectives, Coraiola, Foster, and Suddaby, Chapter 15; Durepos, Chapter 12; Novecivic, Jones, and Carraher, Chapter 2; Taylor, Chapter 11, this volume).

One route that responds to calls for more history, for example, has been the carving of a space for what now comes under the label ‘management and organizational history’, as exemplified by this very Companion. The move in this direction has been very much along the lines of the appeal for an ‘historic’ turn. It has involved both a closer link with critical management studies and a deconstructionist orientation towards history (Rowlinson and Hassard, 2014; Rowlinson, Stager Jacques, and Booth, 2009; Weatherbee, 2012). Thus, the ‘new’ management and organizational history stands as an alternative to evolutionary ‘management history’ (or the ‘history of management thought’) that has developed but then become increasingly marginalized within the American business school environment. Indeed, research and commentary constituting the alternative orientation has developed mainly around a deconstructionist critique of the content and the historiography of traditional management history (e.g. Novecivic, Jones, and Carraher, Chapter 2, this volume; see also Bruce and Nyland, 2011 and Hassard, 2012 as other recent examples).

At the same time, not all engagements with history should be about writing organizational, or for that matter, management history. Other domains connecting to history are equally important and legitimate in our view. Some will be at the level of populations or fields (Coraiola, Foster, and Suddaby, Chapter 15, this volume; Kipping and Üsdiken, 2014; Rowlinson, Hassard, and Decker, 2014). Likewise, although welcome, not all research should or might involve collaboration between historians and organizational researchers. Neither can it or need to always be transdisciplinary. There have been and will be attempts towards integration where history is made an integral part of the theory (Kipping and Üsdiken, 2014). Again, in methodological terms, not all historical management and organizational research does or should rely on primary sources, as Rowlinson, Hassard, and Decker (2014) also acknowledge. Neither will historical research within organization studies necessarily be deconstructionist or subjectivist (cf. Coraiola, Foster, and Suddaby, Chapter 15, this volume).

What is important to stress – and here we beg to differ from many of those making the case for history or an ‘historic turn’ – is the need to also include among the variety of legitimate approaches
the historical research and theorizing emanating from scholars firmly based within the (social) science paradigm. As we have shown in detail elsewhere (Kipping and Úsdiken, 2014), there has been much more history than ‘meets the eye’ in the field of management and organization studies at large. In our survey (Kipping and Úsdiken, 2014) we have proposed to subdivide these efforts by distinguishing what we refer to as ‘history to theory’ and ‘history in theory’. The former involves the use of history as data or evidence, akin to what Rowlinson, Hassard, and Decker (2014) have labelled ‘serial history’. History in theory, on the other hand, refers to approaches, where history is an explanatory or a moderating element of theorizing at the organizational or inter-organizational levels, in particular, imprinting, path dependence, structural inertia, co-evolution, and dynamic capabilities. Probably our most important finding in terms of providing more space for history within mainstream management and organization studies was a growing type of research that we identified as displaying what we called ‘historical cognizance’. It meant that their authors were conscious of the idiosyncrasies of the historical context they dealt with and made explicit the ‘limits to generalizability’ – resulting from the use of history as evidence or as a driver in their theoretical model – with ‘limits’ rather than impossibility being the key term here. This, we believe, is a way of ‘taking history seriously’ without having to move too far from or fully rejecting the social scientistic foundations of management and organization studies.

Personally, against the background of this deepening engagement with history within mainstream management and organization studies, we would even go one step further in suggesting that those wishing to find a larger place for history should take on board some of the basic precepts of (social) science (see also Kipping, 2014). It bears repeating that this does not mean we believe in or suggest a single –purportedly the ‘best’ – way of connecting history with management and organization studies or would want management and organizational historians to espouse its dominant hypothesis-testing methodology as recently suggested to business historians by de Jong, Higgins, and van Driel (forthcoming) for instance. But we do believe that the legitimacy – and publishability – of the wide range of historical approaches discussed above and partially exhibited in more detail in this Companion would benefit from: (i) contributing to debates in the social sciences that have a relatively broad relevance and appeal – or starting new ones for that matter; (ii) explicating as much as possible their sources and the methodology used to analyze them, in order to substantiate their claims and their narratives and to make them replicable for others; and (iii) engaging in some form of generalization – naturally a limited one given historical contingencies – and attempting, if possible, some mid-level theorizing. This, we believe, transcends the artificial and increasingly unhelpful dichotomy between history and social science and would also ultimately allow history to be taken more seriously within (mainstream) management and organization studies.

References
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