Organizations in Time

History, Theory, Methods

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Introduction

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The Future of the Past in Management and Organization Studies

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The purpose of this book is to examine why and how historical research and reasoning should be used in the study of management, organizations, and industries. It builds on recent efforts to incorporate historical perspective into management and organization studies. Our goal is to provide an intellectual foundation for both management scholars interested in the use of historical methods and historians interested in the promise of cross-disciplinary dialogue on the nature of organizations and markets.

The last two decades have witnessed a growing chorus of calls for the integration of history into organization studies (Zald, 1993; Kieser, 1994; Clark and Rowlinson, 2004), along with echoes in the related disciplines of strategy (Kahl et al., 2012), entrepreneurship (Wadhwani and Jones, 2007; Forbes and Kirsch, 2010), and international business (Jones and Khanna, 2006). Both management scholars and historians have argued for the expanding use of historical methods and explanations in organizational research, and historical assumptions and arguments have crept into scholarship in several schools of organizational thought, including neo-institutionalism (Suddaby and Greenwood, 2009), evolutionary theory (Aldrich and Ruef, 2006), and actor-network theory (Durepos and Mills, 2012). The turn toward history in business and organizational research reflects a broader interest across the social sciences (McDonald, 1996; Szreter, 2002; Pierson, 2004; Kaiser, 2009) and in mainstream intellectual discourse (Brooks, 2010; Schuessler, 2013) in the development of historically contextualized approaches to studying economic and social behavior. Surveying these developments, one could fairly conclude, as

Clark and Rowlinson (2004) did, that we are in the midst of a "historic turn" in the study of management, organizations, and markets.

Yet, this apparent consensus masks as much as it reveals when it comes to understanding what a "historic turn" entails and how it might be valuable to the study of organizations. With some notable exceptions (Zald, 1993; Kieser, 1994; Üsdiken and Kieser, 2004; Leblebici and Shah, 2004; Booth and Rowlinson, 2006; Hansen, 2012; Ingram et al., 2013), there has until recently been little sustained effort within either organization studies or business history to examine the nature of historical reasoning and why it might be important to our understanding of organizations. While business history has become more open to new topics and approaches (Jones and Hertner, 1986; Jones and Zeitlin, 2008; Amatori and Jones, 2003; Scranton and Fridenson, 2013), this re-evaluation of the field has rarely (Zeitlin, 2008; Hansen, 2012; Raff, 2013) included deeper consideration of the nature of historical reasoning, why it is important to the study of organizations, or how historical methods actually work. Likewise, mainstream organizational studies have seen growing attention to longitudinal research and historical settings (Ventresca and Mohr, 2002; Leblebici, this volume), but largely due to the extension of existing social scientific reasoning and techniques to longer timeframes rather than through any deliberate reflection on the theoretical and methodological challenges and opportunities involved in an engagement with the past. Ironically, then, the growing insistence that "history matters" in management and organizational studies has been accompanied with little reflection or dialogue about what is meant by "history" and exactly why and how it matters for understanding managers, organizations, and markets.

This book seeks to fill that need. Separately and together, the chapters emphasize the importance and value of recognizing that historical reasoning emerged out of a distinct epistemic and research tradition that cannot and should not be reduced to a longitudinal version of the functional social sciences. Unlike the general theory building and hypothesis testing methods valued by most economic, sociological, and psychological approaches to organizational studies, historical reasoning emphasizes temporally contextualized explanations of organizations and markets and the methodological challenges of assigning significance and meaning to incomplete and temporally distant evidence from the past. The future of history in management and organization studies, we argue, rests on the extent to which historical research and reasoning can be understood and utilized because of these *differences.* The real promise of a historic turn in organization studies, in this regard, lies not in a longitudinal perspective on what economists, sociologists, and psychologists already know or in the application of this theoretical knowledge to temporally remote settings. Rather, it lies in the promise of new perspectives on the nature of organizations and their behavior, perspectives that challenge settled assumptions about the way most organization scholars *and* business historians currently think about organizational choice and action, the methodological

challenges posed by evidence, and the nature of understanding and explanation for the subject under consideration. This book examines these differences in historical epistemology, theory, and methods in order to provide a foundation for a meaningful dialogue about the incorporation of history into the study of organizations.

This introduction contextualizes the chapters that follow within these broader epistemic, theoretical, and methodological considerations. As we show, the growing interest in the incorporation of the past into organization studies has created an opportunity for a "historic turn" following a period when history was largely marginalized by the experimental-science inspired aspirations of organization studies. However, we point out that the barriers to such a historic turn remain significant and include the limited dialogue between organization scholars and historians over the nature of historical reasoning and its relevance to organizations, the opacity of historical methods, and the separation of organization scholars and business historians into distinct intellectual communities.

The first section traces the development of interest in historical approaches to management and organization studies, and explains why we think this is an opportune moment for a deeper dialogue between management scholars and business historians about the nature and value of historical methods. The second section examines the challenges posed by the epistemological differences between "historical reasoning" and "management science," and considers how organizational research can still effectively incorporate history given these differences. The third section demonstrates *how* historical reasoning offers unique insights into the choices and behavior of entrepreneurs, managers, organizations, and markets which the more functional social sciences often miss. The fourth section discusses issues of methodology, and proposes solutions to problems of evidence, analysis, and interpretation that arise concurrently with the insights of historical approaches. The conclusion examines a number of practical considerations and challenges involved in more fully incorporating history into management and organization studies.

ORIGINS OF THE "HISTORIC TURN"

Like the organizations we study, the "historic turn" has had its own history. That history provides a useful perspective on the prospects and challenges of incorporating historical reasoning into organizational research.

In their examination of the role of historical reasoning in organization studies over the course of the 20th century, Üsdiken and Kipping (this volume) show that recent efforts to integrate historical research into organization studies are not entirely new. Indeed, history was an integral element of

what eventually became foundational works on organizations and institutions, including Weber (1978 [1922]; 2003 [1905]), Bendix (1956), Selznick (1949, 1957), Smelser (1959), Stinchcombe (1965), and Chandler (1962, 1977). Moreover, throughout the early and mid-20th century, history was part of the streams of research and teaching that would later come to be identified as organizational studies, especially in the United States. Üsdiken and Kipping show that it was not until the 1950s and 1960s, when organization studies embraced the identity of a *particular form* of inquiry inspired by the laboratory sciences, that history became increasingly marginal. As happened in other social science fields, organization studies gradually gravitated towards a form of science that emphasized general theory, propositional claims, and the separation and testing of independent and dependent variables as ends in themselves. History, in this context, seemed less and less relevant to knowledge formation.

Paradoxically, the foundations for the eventual re-emergence of history at the turn of the century were laid during the height of organization studies' scientific aspirations. In particular, organizational theories that sought to provide longitudinal perspectives on organizational phenomena raised questions about time and process that led scholars back into an engagement with the past. Organization ecology (Hannan and Freeman, 1977) and institutional theory (DiMaggio and Powell, 1983), for instance, integrated temporal dynamics into research that relied on historical data to test assertions in remote time periods (Haveman and Rao, 1997). Likewise, evolutionary theory (Nelson and Winter, 1982; Malerba et al., 1999; Aldrich and Ruef, 2006), process research (Pettigrew, 1992; Langley 1999) and, to a degree, transaction cost economics (Williamson, 1993) seemed open to questions of temporality. Over time, these theories have led many organization scholars into deeper encounters with longitudinal data, historical settings, and archival sources (Ventresca and Mohr, 2002).

Even so, it was the limited manner in which historical reasoning was incorporated in such longitudinal studies that eventually prompted calls for a more self-conscious "historic turn" in organization studies. As Clark and Rowlinson (2004) argued, most longitudinal theories hinged on ahistorical assumptions about the universalism of human and organizational behavior and a timeless present. Leblebici and Shah (2004) called for organization research that neither subsumed history into existing longitudinal theory nor relied only on historical particularity, but rather developed "intrinsically historical theories" (p. 355). These critiques and calls for a more reflective integration of history into organization studies were built on a series of landmark articles by Zald (1990, 1993, 1995) and Kieser (1994) that challenged organization scholars to move beyond the confines of the economic, sociological, and psychological disciplinary orientations in their research and to consider the deeper epistemic, theoretical, and methodological issues that a turn to history raised.

The re-emergence of history in organization studies has occurred in parallel with business historians' ongoing reconsideration of the scope and aims of their own field. Like organization studies, historical studies of business moved in a scientistic direction beginning in the 1960s. This was particularly true in economic history, but was also reflected in business history during the height of Alfred Chandler's influence. Chandlerian business history slowly evolved from the contextualized narrative approach reflected in his 1962 classic *Strategy and Structure* to the more systematic, stylized, and universalist aspirations espoused by his 1990 study, *Scale and Scope*. Although Chandler's works won recognition for business history as a relevant discipline in business schools and among practitioners, many historians found the narrow focus on the organizational structure of big business to be out of step with the broad scope and contextualized knowledge that characterized most other forms of history (John, 1997; Lipartito, 1995).

By the 1990s, critiques by historians and historical sociologists of Chandler's emphasis on the efficiency of big business, along with research showing the vitality of other organizational forms, had opened business history to new topics and approaches (Scranton, 1997; Sabel and Zeitlin, 1997; Fligstein 1993). In recent years, the re-examination of the boundaries of the discipline has resulted in an expansion of the subjects business historians engage (Friedman and Jones, 2011; Lipartito and Sicilia, 2004; Scranton and Fridenson, 2013). The field now encompasses a broad array of topics, including organizational culture, politics, aesthetics, class, race, gender, the environment, and other issues. This expansion has led to a re-engagement with mainstream history, which is itself increasingly returning to topics related to organizations and markets under the banner of the "history of capitalism" (Mihm, 2009; Ott, 2011; Hyman, 2011). The re-examination has also (more slowly) led a few business historians to question the assumptions underlying how we understand and interpret the past (Zeitlin, 2008; Sabel and Zeitlin, 1997; Hansen, 2012) and how we treat sources (Decker, 2013; Schwarzkopf, 2012).

Developments in both business history and organization studies thus suggest that we should be at a conjuncture of flourishing cross-disciplinary thought and engagement. Yet, to date, meaningful dialogue over what are indeed common concerns in these two disciplines has not been forthcoming. Skepticism and misunderstanding across disciplinary boundaries along with the self-critique that good cross-disciplinary dialogue entails remain real obstacles. On the one hand, many historians bridle at explaining to non-historians how an interpretation was produced, embracing what historian John Lewis Gaddis (2002) has called a "Don't ask, we won't tell" policy. On the other hand, while few organization scholars would argue against the claim that "history matters," many still see history in relatively narrow terms, namely as a chronicle, as the past, as a longitudinal perspective, or as background information secondary to the kind of "real" analysis and rigor the social sciences provide. Moreover, while most leading organization and management journals seem to have embraced

longitudinal studies and the use of archival data as legitimate, very few articles employ an explicitly historical approach, in part because of uncertainty about what historical reasoning and methods actually entail (Leblebici, this volume).

The challenges involved in integrating historical reasoning and methods into mainstream management and organization studies should not be underestimated. As Leblebici (this volume) argues, these challenges lie in epistemic differences between history and the other social sciences and how each understands common subjects of study. It is only by more fully understanding such challenges that the promise of cross-disciplinary dialogue between historians and organization scholars can be realized. Failing to do so would simply lead to a reenactment of the old and all-too-common problem of cross-disciplinary engagements that historian Ferdinand Braudel referred to as the "dialogue of the deaf"—the notion that historians and other social scientists tend to talk past one another even as they discuss the same phenomena. In the next section we consider briefly some of the underlying reasons for this tendency and explain the prospects, examined in a number of the chapters of this book, for dealing with the problem.

TRANSCENDING THE DIALOGUE OF THE DEAF

Efforts to incorporate historical research and reasoning into organization studies confront difficult epistemological challenges (Bernardi and Greenwood, forthcoming). Social scientists, for instance, assert that historical research often lacks broad theoretical claims and fails to specify independent and dependent variables, making it seem unrecognizable as research. Historians bridle that such a priori requirements are ahistorical and illegitimate as a means to explain organizational behavior and thought in the past. The prospects for a historic turn in management and organization studies necessarily rest on understanding these epistemic differences, the reasons for their existence, and their implications for *how* to incorporate historical research and reasoning into organization studies. The chapters in Part I: History and Theory, propose alternative ways to overcome these seemingly irreconcilable differences.

Previous efforts to clarify the differences between history's epistemic assumptions and those of the mainstream social sciences have often utilized comparisons to the sciences or to the humanities. Zald (1993) and Clark and Rowlinson (2004), for instance, point to history's humanistic assumptions in order to contrast it with the scientific aspirations of mainstream organizational science. Gaddis (2002), in contrast, suggests that historical reasoning is similar to the approaches used by "historical sciences" (e.g., paleontology,

geology, and evolutionary biology), while mainstream social sciences (including organization studies) follow an "experimentalist" approach. Although we recognize the usefulness of these comparisons, we believe they also hide as much as they reveal about the sources of the epistemic differences between history and organization studies. They also tend to predispose readers to value or discount history based on their orientations as researchers pursuing humanistic or scientific aims.

We, instead, highlight disciplinary differences in *temporal perspective* (Hassard, 1990) in order to account for the points of tension between the epistemic assumptions of historical and functional social scientific research. As Sewell (2005) has pointed out, historical perspectives on time in social and economic research differ from the predominant social scientific understanding of it. This is true not only of cross-sectional social scientific accounts of actions—which separate behavior from time altogether—but also of most "longitudinal" social scientific studies, which imagine time as a clock variable and hence arrange events and action into a chronology, as if observed by the researcher in an unfolding present. In contrast, historical reasoning hinges on the perspective of a researcher looking back on an action, and assessing its relationship in time to developments before and after it occurred. As the philosopher of history Arthur Danto (1965) points out, histories are not mere chronicles of events in the past, but rather employ a retrospective point of view to establish the significance of an event or action in light of antecedent and subsequent developments. This interpreted "significance" may take various forms, including establishing an action's causes, consequences, meanings, and possible implications for alternative paths of development. The use of historical perspective raises a host of theoretical and methodological issues (to which we will return later), but it also helps us understand the basis for several of the more common tensions between historical and functional social scientific accounts of organizations and markets.

First, it highlights why historical research views *actors and actions as temporally situated*. In historical perspective, the significance of an action can only be understood by its relationship to what came before it *and* after it—to its place in time. As Sewell (2005: 6) notes, historical explanations treat time as "fateful" in the sense that "action, once taken, or an event, once experienced, cannot be obliterated." This assumption about time is based on how one experiences action and events in daily life (Carr, 1986); after all, one cannot undo actions once they have taken place and subsequent actions are hence always subject to previous ones. One important implication of this assumption is the relevance of sequence and context. The use of time in historical research differs from the use of time in ahistorical versions of social science, in that in the latter actions are potentially universal and hence may be analyzed as a product of atemporal "determinants" separately from the time in which they occurred (Braudel, 1982).

Moreover, historical reasoning usually involves a complex understanding of time in which confluences of *multiple temporal processes operate together to explain an action at a particular moment* (Braudel,1982; Sewell, 2005). The temporal embeddedness of action in history does not simply mean taking into consideration a set of events on a timeline. Hence, a particular organizational action may be best explained by how a momentary event, a process that had been emerging over several years, and a decades- or centuries-long set of ideas come together in the moment of the action being explained. Braudel (1982: 27) called this the "multiplicity of time" in historical understanding.

Second, historical reasoning emphasizes that explanations of human action require an "*understanding of the subjective motives and contextualized world-views of the actors being studied*" (or *Verstehen,* as discussed in detail in the chapters by Leblebici and Fear in this volume). Unlike those social scientific approaches based on a model of natural science, most branches of modern historical thought are premised on the assertion that, in order to understand human action in the past, one needs to take into account the perspective of the subjects of study (Dilthey, 2002 [1910]), which in turn requires insight into their world (Herder, 1968 [1791]). These subjective motives and concerns need not be the only or even primary factors historical explanations take into account; historical reasoning is also open to the effects of natural environments and behavioral considerations. However, in studying such innately human subjects as organizations, historical approaches often emphasize the importance of reconstructing subjective perspectives and mentalities (Collingwood, 1994 [1946]) rather than giving a priori authority to economically or socially functional forces.

Third, the temporal specificity of historical reasoning points to why historical explanations are based on *embedded generalizations and theoretical claims* rather than universal ones. For historians, social actions and relationships cannot be universal if they are temporally situated and dependent on the actors' perspectives. This does not mean, however, that historians have not tried to discover covering or universal laws in history. Indeed, the debate over whether universal laws could be found in history remained hotly contested through the middle of the 20th century (Hempel, 1942), but was eventually abandoned in the face of significant criticism. Universal and predictive laws and grand, objective syntheses do not easily emerge from historical research given the temporal contingency of the subject and the diversity of perspectives of its actors (Appleby et al., 1994).

Yet, this insistence on temporal specificity and the subjectivity of actors does not mean that historical reasoning is antithetical to theorizing or generalization. Indeed, histories could not be written without generalizations and theorizations about the studied actors and actions. But, as with all else, historical reasoning embeds theoretical generalizations in time—that is, to what came before and what might arise afterwards. As Gaddis (2002: 62) has put it, historians "embed our generalizations within our narratives" while social scientists

often "embed narratives within generalizations." In more prosaic terms, historical knowledge posits that generalizations are context bound and subject to "scope conditions" based on time, place, and the perspective of actors; understanding the scope conditions is at least as important as the generalization or theory itself.

And, fourth, taking into consideration the foregoing points, historical understanding is based on identifying the *interdependency of variables over time* rather than the identification of independent and dependent variables at any one moment in time (Gaddis, 2002). Historical perspective allows that the causal direction between independent and dependent variables can change over time and recognizes that feedback loops, learning, and innovation can change both the fundamental identity of variables and the relationships between them. This perspective requires understanding relationships between actions as contingent and evolving over time. We need to emphasize that this perspective does not preclude the use of quantitative methods to explain causes and effects during particular times (which is something historians often do), but it does indicate the ways in which historical understanding values complex explanations over time that eschew an a priori stance on parsimony and endogeneity.

The epistemic differences between historical and ahistorical social scientific knowledge lead to challenging questions about how to incorporate historical research and reasoning into management and organizational studies. First, given the epistemic differences involved, *why* turn to history at all? And, second, if history is to be engaged, *how* is this to be done given the existing epistemic tensions? The chapters in Part I of this volume address these questions.

In his chapter, Leblebici is skeptical of interdisciplinary approaches that seek to tightly integrate history into management and organization research. Given the significant differences in epistemic culture, such an interdisciplinary approach would likely require compromises on the part of one discipline or the other. He argues that such interdisciplinary efforts—in areas such as "economic history" and "historical sociology"—have not been particularly impactful because of inherent tensions with the core disciplines. Leblebici also points out that, although trends in management dissertations and articles in top organization studies' journals indicate that researchers are increasingly engaging with historical evidence and longitudinal designs, this research rarely describes its approach as historical—a pattern that may suggest underlying tensions about research assumptions and expectations. He posits that instead of pursuing interdisciplinary scholarship researchers interested in the incorporation of history into organization studies should consider a "transdisciplinary" approach in which scholars accept the differences between the disciplines as distinct ways of studying the same phenomena. The transdisciplinary research he advocates would focus on "critical managerial problems

and effective solutions rather than traditional theory based research so that both [historians and organization scholars] could work together without being questioned about the adequacy of their cultures of inquiry."

Focusing on institutional theory, the chapter by Suddaby, Foster, and Mills offers an alternative. The authors see history's epistemic assumptions as not only compatible with institutional theory, but also crucial to a better understanding of certain aspects of institutionalization. "[I]nstitutions or processes of institutionalization contain within them an assumptive historical dynamic that goes beyond mere temporality and which, largely, remains unarticulated in institutional theory," they argue. They suggest that important aspects of institutionalization are lost in the functionalist assumptions that predominate in neo-institutional research and point to Selznick's (1949) classical study of the Tennessee Valley Authority (TVA) as an example of the potential value of historical approaches to the study of institutionalization. In particular, they indicate a number of ways in which a (re)turn to "historical institutionalism" could better account for processes of isomorphic diffusion, bring actors back into institutional theory, and provide a more nuanced way to understand entrepreneurship and embedded agency.

Taking a third approach, Lippmann and Aldrich's chapter suggests that evolutionary theory may prove especially useful for integrating historical reasoning into mainstream organization theory. Like the other authors, they acknowledge the epistemic differences between contextualized narrative approaches to organizational research, like history, and the "deductive/ structural, data driven approaches to theory testing" that predominated in management and organizational science in the mid-20th century. They worry, however, that historical research risks becoming isolated from mainstream scholarship on organizations if its findings and approaches cannot be related to traditional deductive scholarship. "Too frequently, debates about the merits of what we would call 'deductive/structural' versus 'narrative/interpretive' historical approaches have been framed in all or nothing terms, and a true integration of the approaches has seemed impossible," they write. Evolutionary theory offers a meta-theoretical framework for the task through its heuristic processes of variation, selection, and retention, which, they suggest, accommodates interpretive, contextualized findings within a general frame that allows deductive and structural claims as well.

Lastly, Rowlinson and Hassard's chapter argues that neither the universal claims offered by traditional organization studies nor the conventional narratives of traditional business history can adequately capture the promise of a historic turn in organizational studies. Drawing on critical and cultural theory, they assert that epistemic challenges presented by a historic turn require "deconstructionist history" that analyzes the narrative accounts

presented in organizational settings but does so in a way that is itself reflexive. A deconstructionist approach would have strong implications for the way both organization scholars and business historians have read and should read their primary sources. In this way, the authors advocate a type of historical research in which the researcher's position before the sources is critically analyzed.

In sum, the authors in Part I show that although there are important and intrinsic epistemic differences between mainstream organization studies and history, there is still a range of possible paths for the incorporation of historical research and reasoning into the study of management, organizations, and markets. The premises of historical reasoning certainly do suggest that there are ways in which it should *not* be used—including for the development of atemporal or predictive theory—but there are still a rich array of options for historical reasoning to flourish within the scholarship on management and organizations. A glance at the intellectual landscape beyond the boundaries of organization studies and business history suggests that historical reasoning does in fact thrive in endeavors as diverse as many of the sciences (Wilson, 1999) and humanities (Greenblatt, 1991), in addition to the social sciences.

Indeed, we suggest that scholars should be receptive and attentive to the multiple ways in which historical research and reasoning may be effectively used in management and organization studies. History, it seems to us, can be simultaneously used to address the subject-based research questions that Leblebici has in mind, to contribute to the development of theories that are sensitive to time and change as Suddaby, Foster, and Mills and Lippmann and Aldrich point out, and to provide a critical perspective on established understandings, including its own narrative composition, as Rowlinson and Hassard recommend. Confining historical research to only one of these paths would be unfortunate because each approach provides unique insights into organizational research and engages in different types of cross-disciplinary dialogue. Lippman and Aldrich's integrationist approach, for instance, would use history to contribute to mainstream research on the mechanisms shaping organizations and organizational fields over time, while Rowlinson and Hassard's call for deconstruction of historical narratives would provide a critical stance on these same explanations. Researchers should simply be explicit and reflective about exactly why and how they are turning toward historical reasoning in a particular study or stream of research.

This array of options still leaves unanswered the question of exactly *how* historical reasoning works to produce unique insights into the phenomena of interest, temporal processes, and critical analyses discussed by the authors in Part I. It is to this question that we turn next.

THE LOGICS OF HISTORY: CONSTRUCTIVE,
COGNITIVE, CRITICAL

What exactly is it that historical reasoning does and how is it different from other social sciences in the ways it explains organizational action? What unique perspectives can it provide on topics of interest to management and organization scholars? Regardless of whether researchers turn to history to deepen their understanding of a particular phenomenon, to elaborate on theories that deal with change over time, or to gain a critical perspective on seemingly settled issues and theories, they ought to understand *how* historical reasoning will help achieve their scholarly ends.

To understand how historical reasoning works, one must return to the topic of temporal perspective. As we have already emphasized, historical reasoning rests on a retrospective viewpoint, looking back on an action and assessing its relationship in time to developments before and after it occurred.[2] Such a perspective allows the researcher to zoom in and out (Gaddis, 2002) on an action, using different temporal lenses in order to understand its significance, including its causes, consequences, meanings, and possible implications for alternative paths of development.

Hargadon and Douglas's study (2001) of how Thomas Alva Edison's design decisions for electric light overcame institutional constraints provides a useful example. The authors explain that they turn to history because it offers "opportunities to examine social processes in ways that both cross-sectional and even current longitudinal research cannot" (p. 480). Indeed, it is by using different temporal lenses to zoom in and out on Edison's decisions that they are able to arrive at their claim that "robust design" of electric light facilitated change "by exploiting the established institutions while simultaneously retaining the flexibility to displace them" (p. 476). For instance, they begin by taking a long view to show that electric light technologies had been available since the early 19th century and that the development of incandescent light was under way "forty years before Edison's work" (p. 482), hence excluding technology as the primary reason for Edison's success. They also show how the "gas industry had become a highly institutionalized field in the half century since it overturned oil lamps and candles" (p. 484). At other points, they focus on Edison's specific thought process, to show that his design decisions were intended to present "to the public a lighting system already familiar to them" (p. 487). Further, the authors zoom out again to look back on the decision not only from the point of view of the successful adoption of electric light by 1892, but also from the perspective of "over a century later": by doing so, they

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[2] Historians will sometimes try to actively put aside this perspective in order to better interpret sources in context from the past "forward." But the very effort to do this hinges on the initial insight that one is viewing sources in retrospect.

can explain why the industry's evolution reflected Edison's design for a system of light based on centralized power generation, and not J. P. Morgan's alternative vision of an industry "composed of scores of manufacturers, each providing its own line of electricity production and distribution equipment." By viewing Edison's decision from different temporal perspectives, the authors establish the causes, consequences, and meanings of the action they study, as well as the alternative paths of development that the action foreclosed.

Historical narratives, like the one presented by Hargadon and Douglas, commonly use multiple temporal lenses to explain an event or action, but rarely explicitly acknowledge this approach. (Braudel's classical study of the Mediterranean, in this sense, is arguably the most famous exception.) For the purposes of exposition, however, it is useful to tease out the different ways historical reasoning operates and the analytical and interpretive purposes it thereby serves. The terms "historical logics" (Sewell, 2005), historical lenses, and temporalities (Braudel, 2000 [1958]) can be used to denote the variety of ways historical perspective is used to interpret the significance of organizational actions by relating them in time to antecedent, contemporaneous, and subsequent developments. For heuristic purposes, we group these historical logics into three varieties, but neither the specific logics nor the categorization are meant to be definitive and comprehensive. Whereas Braudel (1982) highlighted the use of different temporal spans of time in historical perspective, our classification is used to illustrate the types of research questions historical perspective can be used to address. In each case, we point to existing examples of the use of such logics in management and organizational studies. We also introduce how these logics are used by the contributors to Part II: Actors and Markets, to explain the value of history in studying organizations, entrepreneurs, industries, and the state.

One set of historical logics deals with the question of how time and temporality *constructs* behavior by *shaping and constraining* the actions of organizational actors. It addresses how behavior, action, or events at one point in time relate to behavior or action at another time due to the temporal relationship between them. Historical perspective, in this sense, offers insights into the complex relationship of organizational actions across time—sometimes over long spans of time—that are best or only understood from a retrospective point of view (Goodman et al., 2001).

This approach to historical reasoning, based on how temporality constructs actions, is probably the most widely accepted and used in management and organizational studies. Examples of such temporal mechanisms in organizations include path dependence (Schreyögg and Sydow, 2011; Schreyögg et al., 2011), organizational imprinting (Marquis, 2003; Johnson, 2007, 2008), routines (Cohen et al. 1996), formative events (Lampel and Meyer, 2008) and institutionalization processes (Suddaby et al., this volume). Lawrence et al. (2001) and Leblebici et al. (1991), for instance, analyze a process of institutionalization

as one taking place at varying rates, followed by a period of stabilization that also varies between organizations. In their analysis of how technological oversights and foresights occur, Garud et al. (1997) and Langlois (1997) argue that technological choices are constrained by the past and this constraint in turn determines technological innovation.

As several chapters in Part II of this volume point out, other related lines of reasoning on the temporal construction of organizations and markets remain either unexplored or only partially explored and offer management and organizational researchers opportunities for further development. For instance, in his chapter Jeffrey Fear points to the use of *periodization* in history as a tool for organizing and contextualizing organizational behavior over time and argues that periodization is one way in which historical approaches can further contribute to organizational research. Such "period effects" have also been identified by Aldrich and Ruef (2006) as theoretically relevant to evolutionary theory, but remain relatively unexplored in empirical research and Fear suggests that embracing periodization can even be a useful tool in contextualizing organization theory itself. Similarly, in their chapter on entrepreneurship, Wadhwani and Jones point out that periodization of entrepreneurial behavior based on institutional environments reveals how entrepreneurial risks and resource allocation processes have been variably organized over time. They point to Baumol's (1990) use of periodization to develop the theoretical distinction between productive, unproductive, and destructive entrepreneurship as a promising example of the relevance of such an approach to other kinds of entrepreneurial phenomena.

Other chapters point to the value of examining *antecedents* that shape the behavior of actors and markets. Bucheli and Kim highlight the role of a nation state's antecedents in determining how it acts to confer legitimacy on organizations within its boundaries. As they point out, while the political legitimacy of organizations has received attention in management research, little consideration has been given to the antecedent dynamics shaping the legitimacy of the state. Understanding the antecedents of state legitimacy in different national contexts, they argue, could shed light on the ways in which states in turn legitimize organizations. Similarly, the chapter on industry emergence by Kirsch et al. posits that antecedents of industries have been ignored. The standard "industry life-cycle model" focuses on the point of a new technology's commercialization as the moment of industry origin. However, as the authors point out, antecedent developments also shape industry characteristics. Studying the antecedent developments provides an opportunity to consider the conditions under which a new technology *fails* to be commercialized.

A second variety of historical logic uses a *cognitive* lens to consider how the identity of actors and their motivations for actions are themselves constructed by these same actors' perception of their place in historical time (Sabel and Zeitlin, 1997; Hansen, 2007; Popp and Holt, 2013). The cognitive perspective

emerges from the historical tradition that warns against imposing presentist conceptions on actors in the past (Herder, 1968 [1791]; Dilthey, 2002 [1910]; Collingwood, 1994 [1946]). It thus emphasizes the value of understanding actors on their own terms as historical agents rather than as primarily responsive to economic, social, and political conditions. Actors, in this sense, understand themselves, their choices, and their own actions as historically situated (Carr, 1986). This approach to historical temporality may emphasize either constraining, taken-for-granted characteristics of actors' historical rationality or its reflective and agentic possibilities—which, in effect, can be considered two sides of the same coin, both taking the actors' historical consciousness seriously.

In the context of management and organizational studies, work in this tradition is relatively new but is rapidly growing. From this perspective, organizational actors' rationale for behavior is based in large part on their own understanding and "uses of history" (Hansen, 2012). In some studies, the historical identities of actors are subject to change in part because external conditions create a "shock" to their taken-for-granted historical understandings. But perhaps even more interesting and promising is research that takes organizational actors as historically reflective and hence capable of agency, rather than as reactive to the prevailing social, political, and economic factors or by the received and taken-for-granted histories of their time. New approaches, such as "rhetorical history" (Suddaby et al., 2010), examine the creative and strategic possibilities that emerge from taking the reflective historical capabilities of organizational actors seriously.

Several of the chapters in Part II explore these possibilities. In their chapter, Kirsch et al., for instance, posit that such an approach would allow us to re-think our understanding of industry emergence. Industries, they point out, frame stories of their development based on participants' historical understanding of their own creation as they "emerge," and these stories are often passed down unquestioned to scholars, too often becoming a basis of the "stylized" facts that form theory. Instead, Kirsch et al. argue for a more critical view of industry historical narratives in understanding the formation of an industry's own identity. Likewise, Wadhwani and Jones argue that this approach can help researchers better understand the creativity of entrepreneurs and entrepreneurship, and shed light on the nature of entrepreneurial "opportunities." And Fear emphasizes the value of such an approach in the formation of organizational knowledge and identity. Even more than the first approach, the treatment of organizational actors as historically conscious and reflective subjects strikes us as particularly promising in organizational research.

A third approach uses historical perspective to gain a *critical* angle on the taken-for-granted categories, explanations, and theories that predominate in management and organizational studies. From this perspective, a deeper lens on time, a wider lens on place, or the broadening of perspectives to include

include overlooked organizational actors facilitates a critical view of the assumptions that cross-sectional or longitudinal perspectives take for granted.

The wave of organizational scholarship that has re-examined the conventional history of the Hawthorne Studies provides an example of the use of history to gain a critical stance on organizational issues. In the conventional account, the Hawthorne Studies—which were conducted at Western Electric's Hawthorne Works in the late 1920s and early 1930s—are seen as a scientific breakthrough in knowledge of organizational behavior that played a pivotal role in shifting managerial thought from a focus on "scientific management" to one based on "human relations." Deeper historical research, however, has shown that not only were the effects of the studies well understood within Western Electric before the experiments (Gillespie, 1991), but also that the motivations of the researchers in establishing the Studies' "findings" were shaped by political and career motivations (O'Connor, 1999) and connections to powerful interests (Bruce and Nyland, 2011). The contextualization of the studies within the history of Western Electric, as Hassard (2012) has shown, reveal that the company practiced the basic elements of human relations policies *before* the experiments, both for strategic reasons and because of the particular history it had with its labor force. Deeper examination of the received history is thus used to question assumptions held in the present about the relationship between scientific research on organizations and its motivations and effects (Hassard, 2012).

The chapters in Part II introduce several potential uses for this approach to historical reasoning. Bucheli and Kim, for instance, use historical perspective to critique the depiction of "the state" as it has come to be understood in management theory, primarily from the point of view of institutional theory, as a source of authority capable of conferring legitimacy on organizations. They argue that this assumption is based largely on the ways in which states themselves achieved legitimacy through struggles between competing interests, but that the pattern often seen in Western states cannot be assumed to apply to other regions of the world over time. They suggest that understanding the legitimacy of organizations and organizational fields may mean different things in different national contexts and that this requires a historicization of the state. Wadhwani and Jones, likewise, critique entrepreneurship theory as it has developed in the last three decades, and advocate that the theory should be contextualized in a particular moment of time when large industrial firms experienced a period of stagnation (Wadhwani, 2010). A historical perspective on the concept of entrepreneurship, they argue, helps us better understand the phenomenon and shows us the contextual limits of most definitions of entrepreneurship used today.

For the purposes of exposition, we have separated out distinct temporal lenses or logics in order to show how different ways of using historical perspective may provide insights into different kinds of action in the past. Many

management and organization researchers may find value in focusing on one type of logic in order to examine a subject of interest—a step toward the incorporation of history into management studies that we would welcome. In many cases, however, good historical explanations hinge on weaving together multiple logics or temporalities into complex historical narratives or representations (White, 1975; Ankersmit, 2001). Historians, indeed, may protest such a dissection of historical reasoning into distinct parts and processes which artificially separates out logics that in fact intersect and interact in historical explanations. We agree that historical narratives and representations that employ "multiplicities of time" (Braudel, 1982) should have a central place in organizational research, but also suggest that there is room for both more focused and discrete efforts to examine particular logics more deeply, as well as opportunities to pursue full narrative accounts of subjects in the past. Indeed, we see no reason why a clearer understanding of *how* one is using historical reasoning would not contribute to deeper understanding of both studies that focus on one type of historical reasoning and complex narratives that bring together multiple temporal lenses into a whole representation of the past.

The "logics of history" and historical narratives hence offer extensive opportunities for new and unique insights into the behavior of actors, organizations, industries, and states. But the use of historical perspective also raises methodological questions about how historical research actually goes about using evidence to come to valid explanations and interpretations about the past. If historical reasoning involves interpretations that assign significance to events in systematic ways, how do we understand how and on what grounds historians make such designations? And, how can such methods be used to distinguish good from bad history? It is to this question that we turn in the final part of the book.

THE HISTORIAN'S CRAFT REVISITED

"Either all minds capable of better employment must be dissuaded from the practice of history, or history must prove its legitimacy as a form of knowledge," wrote the historian Marc Bloch in the classical *The Historian's Craft* (2004 [1946]). Bloch's reflections are all the more poignant because he wondered aloud "whether he has spent his life wisely" (p. 3) as he sat in Nazi captivity awaiting his eventual execution. Indeed, Bloch's bold challenge to the legitimacy of historical knowledge strikes at the heart of the value of historical perspective in management and organizational research. History's legitimacy as a way of understanding management and organizations rests not only on recognizing how history offers unique insights into its subjects of examination, but also in reflecting on how exactly historical knowledge of organizations and

markets is produced. While work on the former issue is expanding, work on the equally important latter question is just beginning.

Unfortunately, business history has not been particularly transparent or reflective about its methods, and business historians are often reticent about explaining their research process (Schwarzkopf, 2012; Decker, 2013). Mainstream history, particularly in the United States, has not been much more open. As we pointed out earlier, historians often take what Gaddis (2002: 92) has called a "Don't ask, we won't tell" stance on methodology. To some extent, this stance is understandable, for many historians see themselves as producing historical narratives for "informed general readers" and perceive the social scientific norm of explaining methods as a kind of ugly and burdensome post hoc justification that detracts from the integrity of the narrative. Indeed, the reticence to discuss methods seems to arise at least partly from the sense that exposing the inner gears and springs of historical clockwork is bad craftsmanship.

This position is hardly conducive to dialogue across disciplines, where the reasonable question of "how did you do that" is necessary in establishing understanding. This attitude has left even sympathetic management and organization scholars with the impression that history simply means reporting "one damn fact after another," in which there is not much interest in engaging with theory (Taylor et al., 2009). Or, perhaps worse yet, that historical methods basically conform to Leopold von Ranke's (1973 [1881]) dictum that historians just try to tell it "as it actually happened."

Not surprisingly, then, most of the growing body of research on the past in mainstream management and organizational journals has avoided the explicit characterization of the work as "historical." Rather, organization and management scholars have opted for approaches that extend their accepted methods of analysis to historical data. For instance, Ventresca and Mohr (2002: 810) distinguish a "new archivalism" in management research that uses primary sources in rigorous ways "steeped in the ethos and methods of formal social science" and hence distinct from the "historiographical tradition" (which is characterized as "essentially ethnographic studies of organizations conducted through the medium of archival materials"). In other cases, history has had to be snuck into management publications using methodological Trojan horses, such as "discourse analysis," (Khaire and Wadhwani, 2010) and "case study methodology" (Tripsas and Gavetti, 2000; Kaplan and Murray, 2010; Bucheli and Kim, 2012). As a result, even scholars interested in historically informed research on organizations and markets are not engaging historical traditions themselves when defining their methodological approach.

The neglect of historical methodology is unfortunate because history's use of the retrospective viewpoint raises unique and important questions about the nature of historical evidence and interpretation. Unlike experimental data, historical evidence is not created in circumstances under the control or even

under the observation of the researcher. It is usually comprised of incomplete and fragmented traces of the past that raise methodological questions of why and how the evidence being used was preserved. Moreover, even when sufficient data exists for quasi-experimental analysis, questions arise about its interpretation in context. How does one assess evidence in a way that takes into account the time and place of its creation? In short, the use of historical perspective raises unique methodological questions that the extension of traditional social scientific techniques to the past cannot, by themselves, address.

Despite the historical practice of avoiding extensive methodological discussions within narrative accounts, history actually has a considerable but often overlooked tradition of engaging the methodological issues referred to previously. Somewhat akin to common law systems, historical standards and rules have been embedded in historical practice and explained in separate treatises rather than codified in procedures. These practices and treatises are a good starting point for considering the nature of historical methods and how they differ from other methodologies in management and organization research. The chapters of Part III in this volume introduce some of these traditions, methods, and practices and consider them in the context of the questions, needs, and interests of management and organizational research.

Yates' chapter begins by orienting readers to historical methods within the scope of methods currently familiar to organization scholars. She draws on the central distinction between quantitative methods—which tend to be deductive and hypothesis-testing in orientation—and qualitative methods—which tend to be interpretive and oriented toward theory building. Yates notes that historical methods are certainly closer to qualitative research in this basic classification system, but she cautions that there are important distinctions related to the temporal character of historical research. In particular, historical research's temporal perspective is different from most other approaches in organizational studies both in its consideration of evidence and in its approach to analysis and interpretation. The last two chapters of the book, by Lipartito and by Kipping et al., address these issues of evidence and analysis in greater depth.

While questions of what constitutes evidence and how to identify it are at the heart of both history and organization science, the two disciplines in fact tend to view evidence in different ways. As Lipartito points out, there are important implications embedded in the distinction between the social scientific approach to evidence as "data" to be tested and the historical approach to evidence as "sources." The distinction is important because "sources" imply that the evidence has not been directly observed and that the passage of time between its production and its analysis has created important methodological challenges to its interpretation. Moreover, Lipartito points out that sources are in fact just traces of the past that, in order to be interpreted, must be engaged in relation to one another and in relation to the questions being posed. Historical research processes hence integrate source identification with theorization and

analysis in iterative processes of abduction, deduction, and induction rather than considering data collection as a discrete phase of research. Lipartito additionally points to the historical tradition of source and archival criticism, including the examination of the political and institutional processes involved in source preservation, as a crucial part of historical methods.

Finally, Kipping et al. propose a set of basic methods for the analysis and interpretation of sources in management and organizational research. While traditional historical publications rarely explain their methods, researchers interested in the use of history in management and organizational studies will certainly need to be more explicit about the processes they use in moving from sources used to the analyses and interpretations they present. The authors draw on traditions and debates extending to the origins of history as a professional discipline in the 19th century to illuminate the analytical and interpretive processes used in historical research. Specifically, they argue that the interpretive process includes drawing on the traditions of source criticism, the triangulation of sources, and the hermeneutic foundations of interpretation. Such an approach, they argue, allows researchers to take into account the temporal and fragmented nature of sources as well as to reconstruct the perspective of historical actors themselves, while recognizing the limits on such reconstructive engagement that time and the researcher's own perspective create.

In sum, the chapters in Part III begin a dialogue on the nature of historical methods and their inclusion within organization studies. The discussion of methods highlights the need to deepen and critique more clearly and openly how historical research arrives at interpretations of the past, just as the contextualized generalizations discussed in Part II suggest possibilities for how the past may be theorized in management and organizational studies. But just as important to the success of such efforts are the more practical and prosaic concerns of how and by whom such questions will be engaged. It is with this question that we conclude.

(RE)INVENTING TRADITIONS, (RE)IMAGINING COMMUNITIES

In this introduction, we have shown how the chapters of this book lay out new directions for thinking about the incorporation of historical reasoning and research into the study of management, organizations, and markets. While differences in disciplinary epistemic assumptions pose challenges, this volume shows how thoughtful efforts to incorporate history can deepen understanding of particular subjects, lead to new insights into processes involving time and change, and allow critical perspectives onto settled ideas and categories,

and that such efforts hold much promise in management and organizational studies. Historical perspectives and reasoning provide unique insights by allowing researchers to "look back" on organizational behavior and thought in order to identify relationships and processes over time, to consider the historical consciousness of organizational actors, and to take new temporal, spatial, and social angles onto organizational issues. Such a perspective raises unique methodological challenges and opportunities pertaining to the identification, interpretation, and analysis of sources that hold the promise of contributing to new ways of studying organizations.

Still, the historic turn faces challenges because it requires new ways of *acting* and not just new ways of *thinking*. The institutionalization of disciplinary boundaries and professional practices creates obstacles for the incorporation of history into management and organizational studies. For instance, differences in preferred publication genres between history and organization studies lead to divergent understandings of what is considered valid or legitimate scholarship. Articles published in a few top academic journals drive perceptions of scholarly value in management and organizations research, while historians prize books published by respected academic presses. Extended and explicit discussions of methodology are required in peer-reviewed management journals, while they are often considered inappropriate in business history. Accrediting bodies or those determining business school rankings do not give much weight to research monographs or articles in historically oriented journals, something that discourages rising schools from supporting such research by their faculty. Business historians and management scholars also belong to different scholarly associations and develop networks and communities that rarely overlap. Add to these differences in tenure expectations, typical career trajectories, and departmental pressures, and one gets a clearer sense of how institutionalized practices pose serious practical challenges for those who see the intellectual promise of the incorporation of history into management and organization studies.

Addressing these issues will require a different type of historic turn, one in which management scholars and business historians are willing to use historical perspective to reflect on their own institutionalized practices. Historical reasoning, as we have shown, suggests that institutions are often not as rigid or deterministic as functionalist perspectives sometimes make them out to be; taken-for-granted routines and practices are not timeless codes or templates. Rather, such myths are often the product of what Hobsbawm and Ranger (1983) called "invented traditions," collective understandings of the past that on closer inspection show themselves to be of surprisingly recent origin and subject to change through historical reflection and critique.

Many of the institutionalized practices that seem so intractable and work against a historic turn are in fact recently invented traditions—the result not of deep and timeless disciplinary differences but of collective memories that

have been contrived to make them seem so. The distinction between scholarly books and articles in business schools, for instance, is of relatively recent vintage; indeed, many of the most impactful organizational research was, until the last couple of decades, published in books. Likewise, business historians' reluctance to discuss methods and engage in theory development belies a deeper history that suggests that explicit interdisciplinary engagement with theory and methods was central to the origins of the discipline itself.

Changing institutional structures and the settled habits of entire fields may at first seem like a Herculean task, requiring the intervention of powerful institutional entrepreneurs. However the first decade of the 21st century has been marked by a series of promising developments that suggest that a more subtle shift is needed, and is in fact underway. There are clear signs that management and organization scholars not only see the promise of a historic turn, but have also begun to act in ways that look beyond the limits imposed by institutionalized practices. Prominent business historians and management scholars have begun to actively reflect on the nature of historical knowledge and its value in understanding organizations and markets (Hansen, 2012; Ingram et al., 2012). Scholars studying non-OECD countries have challenged accepted ideas of how organizations work through business historical studies (Decker, 2010; Dávila, 2004). New journals have appeared to promote the historic turn (Booth and Rowlinson, 2006), established ones have become more open to cross-disciplinary work (Friedman and Jones, 2011), and major management journals have published special issues on historical research (Graham and O'Sullivan, 2010; Godfrey et al., 2013). The number of co-authored articles and collaborations between historians and organization scholars also seem to be increasing. And cross-disciplinary groups of scholars at conferences such as the European Group for Organization Studies (EGOS) and the Academy of Management (AoM) are engaging in ongoing research pertaining to the historical analysis of management, organizations, and markets. Such developments raise the chances of re-examination and re-invention of those traditions that artificially limit the use of historical reasoning in organizational research, and suggest that the future of history in organization studies depends in large part on how thoughtfully we understand our own past.

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