

**WHAT IS ORGANIZATIONAL HISTORY? TOWARD A CREATIVE SYNTHESIS OF
HISTORY AND ORGANIZATION STUDIES ***

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* The late Mayer Zald had agreed to serve on the editorial team for this special topic forum and expressed his wholehearted endorsement of the project. In 2012, only a few months after the special issue won *AMR*'s approval, he passed away. Our debt to him remains intellectual but significant nevertheless. The organizing principle of creative synthesis was inspired by Zald's concept of the foundations of organization studies as a historical project solidly grounded in humanistic as well as scientific inquiry, as an emerging field that could flourish by exploring these ties, and as a creative process that could be enriched through dialogue across disciplines, traditions, and communities.

We thank everyone who supported this Special Topic Forum on History and Organization Studies. Former editor Roy Suddaby inspired us from the outset through the completion. We are also grateful to Tiffiney Johnson, our managing editor, for guiding us through the whole process. We thank our reviewers and submitting authors for their work on each and every manuscript. The quality and quantity of work submitted give us confidence for the future. As special issue editors, we have worked as a team, and our names are listed above in alphabetical order.

ABSTRACT

As a synthesis of organization theory and historiography, the field of organizational history is mature enough to contribute to wider theoretical and historiographical debates and is sufficiently developed for a theoretical consideration of its subject matter. In this introduction to the Special Topic Forum on History and Organization Studies, we take up the question, “What is organizational history?” and consider three distinct arguments that we believe frame the next phase of development for historical work within organization studies. First, we argue that following the “historic turn,” organizational history has developed as a subfield of organization studies that takes seriously the matter of history, promoting historical research as a way to enrich the broad endeavor of organization. Second, if “history matters,” then organization theory needs a theoretical account of the past that goes beyond the mere use of history as a context to test or as an example to illustrate theory. Third, the focus on “history that matters” in the present leads to two important considerations: how organizations can use “rhetorical history” as a strategic resource and the need to engage with historiographically significant subjects that connect organization theory to larger humanistic concerns, such as slavery and racism.

Historians often ask, “What is history?” The question lends itself to at least two kinds of answers, as set out by E. H. Carr (1964) in his classic lectures delivered at Cambridge University in 1961. First, for the philosophy of history, the question calls for an epistemological consideration of the balance between objectivity and relativism and an ontological debate about the role of the individual and society in history—or, in contemporary sociological terms, the relative importance of agency and structure. Second, the question sets the agenda for a theoretically informed survey of the appropriate subject matter for history as a whole, or for a particular subfield, such as *What is Cultural History?* (Burke, 2008; Lachmann, 2013; Magnússon & Szijártó, 2013). Asking the question, “What is organizational history?” suggests that a dedicated line of inquiry has matured enough to contribute to wider historiographical debates and has sufficiently developed to warrant a theoretically informed survey (Weatherbee, McLaren, & Mills, 2015: 3).

In what follows we sketch an answer to the question, “What is organizational history?” and introduce the articles that constitute this Special Topic Forum on History and Organization Studies, which demonstrate the *breadth* of organizational history in relation to the variety of topics and perspectives, the *depth* of inquiry and intellectual sophistication of historiographical theorizing, and the *potential* of the subfield to provide insight into current topics in business and organizational research. Our call for papers met with enthusiasm from a wide range of researchers; the fifty-nine submissions confirmed, for us, a growing body of high-quality, historically informed theoretical work. We see this forum as evolution whereby management and organization scholars become more receptive to work explicitly informed by history and historical theory, but where they also develop clearer criteria to assess the quality and contribution of historical research. We hope that historians in general and business historians in particular will, in turn, become more methodologically reflexive and receptive to organization theory. Our call for papers and this essay

recognize history as a vital component in making the study of business and management more ethical, humanistic, and managerially relevant (Jacques, 1996).

This introduction locates organizational history within the broad universe of organization studies and a constellation of related subfields, particularly business history and management history. The six articles for the special topic forum can be situated in relation to three relevant historical themes. First, the “matter of history,” or the “historic turn,” draws on the theory and philosophy of history, as well as the work of historians in neighboring fields that enriches organization studies. Second, advocates of history have argued that if “history matters,” then organization theory itself needs to provide a theoretical account of the past and not merely use history to test or illustrate theory. Third, the need for “history that matters” not only leads to consideration of how managers and their organizations can employ history as rhetoric but also invites examination of societally controversial subjects, such as the business and organization of slavery and racism.

We see the six articles selected for the special topic forum as exemplars for the emerging field of organizational history. Maclean, Harvey, and Clegg (2016) propose a 2 x 2 matrix for mapping historiographical theory onto organizational paradigms. Likewise Vaara and Lamberg (2016) outline three historiographical perspectives for research in strategy. Both of these articles move beyond the critique that initiated the historic turn and facilitate further integration within and between history and organization studies. Lippmann and Aldrich (2016) start from the view that “history matters” and extend this to explore how shared “historical experiences” shape generations of entrepreneurs in a particular time and place. Ocasio, Mauskapf, and Steele’s (2016) model of collective memory making reinforces the importance of history in the institutional logics perspective. Finally, both Schrempf-Stirling, Palazzo, and Phillips (2016) and Mena, Rintamäki,

Fleming, and Spicer (2016) confront “history that matters” for corporate social responsibility. Schrempf-Stirling et al. propose a model of how corporations respond to instances of past irresponsibility, while Mena et al. develop the concept of “forgetting work” to explain how past irresponsibility comes to be forgotten.

THE MATTER OF HISTORY, OR THE HISTORIC TURN

In this section we describe the historic turn in organization studies and work to locate organizational history in comparison to two other subfields: business history and management history. The historic turn started with a series of influential articles by Alfred Kieser (1994) and Mayer Zald (1993, 1996). Around the same time as Kieser and Zald’s interventions, the rise of critical management studies promoted a more historical reading of Max Weber’s work (e.g., Cummings & Bridgman, 2011; du Gay, 2000) and an interpretive, philosophically informed approach to historiography (Burrell, 1997; Jacques, 1996; Rowlinson, Stager Jacques, & Booth, 2009). As Kieser (2015) recently observed, history has been integrated into organization studies to the extent that there has been continuing debate about the contribution history can make (Carroll, 2002; Godelier, 2009a,b; Leblebici & Sherer, 2008; Popp, 2009; Üsdiken, Kipping, & Engwall, 2009).

We see an increasing number of stand-alone historical articles and special issues on historical themes in leading journals, including the *Journal of Organizational Change Management* (van Baalen & Bogenrieder, 2009), the *Journal of Management Studies* (O’Sullivan & Graham, 2010), *Organization Studies* (2015 call for papers for Special Issue on Uses of the Past: History and Memory in Organizations and Organizing), and *Strategic Entrepreneurship Journal* (2016 call for papers for Special Issue on Historical Approaches to Entrepreneurship).

Further evidence for the development of “a historically oriented sub-community” (Kieser, 2015) comes from the launch of three specialist journals specifically set up to facilitate interdisciplinary debate: *Industrial and Corporate Change* (Rosenbloom, 1997), the *Journal of Management History*, and *Management & Organizational History* (Booth & Rowlinson, 2006). Organizational history appears primed to differentiate itself from both business history and management history.

Organizational, Business, and Management History

Organizational history. Organizational history can be defined loosely as research and writing combining history and organizational theorizing. This covers a wide spectrum, ranging from research that is primarily historiographical, which could be referred to as *history-with-theory*, to writing that is mainly theoretical, or *theory-with-history*. We can consider this spectrum in relation to the neighboring subfields of business history and management history. There is now a well-established dialogue between organization theory and business history, exemplified by a book edited by two business historians (Bucheli & Wadhvani, 2014)—*Organizations in Time: History, Theory, Methods*—that brings together organization theorists (Leblebici, 2014; Lippmann & Aldrich, 2014; Rowlinson & Hassard, 2014; Suddaby, Foster, & Mills, 2014) and business historians (Fear, 2014; Lipartito, 2014; Wadhvani & Jones, 2014), as well as contributors whose work spans the fields of history and organization studies (Yates, 2014).

Business history. Inquiry in business history remains eclectic in terms of theory and methods, and the distinguishing feature is a commitment to “primary archival research” (Jones & Zeitlin, 2008: 3). Only a small proportion of business history could count as organizational history, in the sense of being explicitly theorized, and not all organizational history would necessarily be counted as business history, in the sense of using sources found in organizational archives.

Nevertheless, academic business history that incorporates organization theory could be seen as a manifestation of history-with-theory, whereas organization theory that engages with historiography would represent theory-with-history. Leblebici identifies the “basic dilemma” for interdisciplinary debate, which is that “one discipline becomes the driver of the research agenda making the other discipline a secondary contributor” (2014: 78). In the conversation between organization theorists and business historians, a division of labor emerges where the organization theorists outline alternative theoretical approaches to history (Leblebici, 2014; Lippmann & Aldrich, 2014; Rowlinson & Hassard, 2014; Suddaby et al., 2014), while business historians are left to explicate historical sources and methods (Kipping, Wadhvani, & Bucheli, 2014; Lipartito, 2014) and to identify historical topics for theoretical exploration (Fear, 2014; Scranton & Fridenson, 2013).

The challenge for organizational historians is to develop a “transdisciplinary approach” (Leblebici, 2014) that starts from recognizing the differences between theory-driven historical sociology, or historical organization studies, on one side and, on the other side, story-driven sociological history, or organizational studies of history (Rowlinson & Hassard, 2013). Maclean et al. advocate “historical organization studies,” where “history is integral” and “history and organization studies are of equal status” (2016: 610). They propose the concept of “dual integrity” to denote historical organization studies that would be “deemed authentic within the realms of both organization studies and history” (2016: 615). Dual integrity represents a useful benchmark for assessing whether research could be described as organizational history, as well as an aspiration for a truly transdisciplinary approach. Even so, it is not difficult to think of well-regarded exceptions that would stretch the notion of dual integrity but probably still count as exemplars of organizational history. In his historical case study of corporate crisis and change, for example,

Prechel (1991) uses a pseudonym, Taggert Steel Corporation, for one of the largest steel corporations in the United States (1991). Prechel assures us that he verified his “historical narrative ... from multiple sources of public, archival, and interview data” (1991: 429), but he cites no sources and fictionalizes all proper names. It is difficult to imagine how this could be deemed authentic for publication in, say, a business history journal; however, Prechel’s focus on the theoretical issues in play, and not merely the sequence of events, defines the contribution.

Management history. Management history, as the history of management thought (Wren & Bedeian, 2009), should also be distinguished from organizational history. One can study the history of management theory without any explicit reference to either organization theory or the theory and philosophy of history. However, a clear boundary proves elusive, since good management history incorporates elements of historical and organizational theorizing; for example, Godfrey and Mahoney (2014) show how Chester Barnard’s work continues to speak to organizational scholars and organization theory today. Our editorial team came together in part through a shared interest in theorized management history. O’Connor’s (1999) account of Elton Mayo’s highly political relationship with Harvard Business School stands out as a rare example of an article in the *Academy of Management Review* with dual integrity, combining citations of historical sources with a theoretical contribution. Following O’Connor’s critique, the historiography of human relations and its historical context has been revisited in a series of studies reflecting the growing interest and concern of management and organizational scholars with the history of their discipline and its institutional location in business schools (Khurana, 2007; O’Connor, 2012; Ruef, 2008).

Management history clearly overlaps with organizational history when it moves away from an exclusive focus on the content of management thought and incorporates organization theory

into its analysis of history. Bruce and Nyland (2011), for example, deconstruct the orthodox textbook view of human relations as a response to the inhumanity of scientific management. Using Mayo's published work and unpublished correspondence, they show how the "truths" of human relations were constructed in order to appeal to business leaders. Their method is explicitly derived from actor-network theory (ANT), following the actor-network deconstruction of corporate history (Durepos, Mills, & Helms Mills, 2008)—dubbed ANTi-history (Durepos, 2009; Durepos & Mills, 2012a,b). Similarly, Hassard (2012) draws on ANT to rethink the significance of historical context in the Hawthorne studies, highlighting the importance of the tragic outing in 1915. Over 800 of Western Electric's employees and family members perished when the ship they were on sank in the Chicago River, America's worst maritime disaster.

Hassard (2012: 1434) credits both O'Connor (1999) and Bruce and Nyland (2011) with an "anti-revelatory or deconstructive stance," and the deconstruction and critique of habitual *revelatory* historical narratives found in management and organization theory textbooks are now well established (Hassard, 2012), even if the textbooks are impervious to such critique. The textbook misrepresentation of Abraham Maslow has been a focus of critique (Cooke & Mills, 2008; Cooke, Mills, & Kelley, 2005); Cooke (1999; 2006, 2007; Kelley, Mills, & Cooke, 2006) has also made the case that the significance of Kurt Lewin's leftist political orientation has been written out of the textbook accounts of change management. Bridgman and Cummings take an explicitly Foucauldian historical approach to deconstructing the textbook treatment of Max Weber (Cummings & Bridgman, 2011), Kurt Lewin (Cummings, Bridgman, & Brown, 2016), and the case method of teaching (Bridgman, Cummings, & McLoughlin, 2015) as part of their argument for a more theoretical approach to history in management education (Cummings & Bridgman, 2015).

As a research strategy in management history, however, “historical deconstruction” predates the explicitly theoretical approaches to history associated with the historic turn (Hassard, 2012: 1437). If questioning a widely accepted myth, story, or orthodoxy can be called deconstruction (Evans, 1997: 207), then much of the late Charles Wrege’s (Wrege & Greenwood, 1991; Wrege & Hodgetts, 2000) work could be seen as a form of deconstruction, even if Wrege himself might not have regarded it as such. In Wrege’s earliest publication in the *Academy of Management Journal*, for example, he and coauthor Amedeo Perroni (Wrege & Perroni, 1974) deconstructed the myth that the pig iron loading experiments conducted by Taylor in 1899 demonstrated the revolutionary contribution of scientific management. Their methodological approach anticipated that of Cummings and Bridgman (e.g., 2011), although they did not seem to need any explicit historical theory. The article starts by establishing the prevalence of the myth in management and industrial psychology textbooks, citing eleven published sources from 1918 to 1970. The authors show how Taylor developed three different versions of his pig iron story, with the final version crystallized in *The Principles of Scientific Management* (Taylor, 1967/1911).

Toward a Synthesis: Organizational History

Turning back to the division of labor we identified earlier, the articles by Maclean et al. (2016) and Vaara and Lamberg (2016) represent seamless collaborations between organization theorists and historians. Mairi Maclean’s own background is in international relations. Her coauthor Charles Harvey is probably one of the few authors published in the *Academy of Management Review* who could claim to be a professional historian, in the sense of having a degree in history and experience teaching in a university history department (Evans, 2001b). He is also a former editor of *Business History*. Maclean and Harvey have written a series of theoretically

informed articles in management and organization studies as well as business history journals (Harvey, Maclean, Gordon, & Shaw, 2011; Harvey, Press, & Maclean, 2011; Maclean, Harvey, Sillince, & Golant, 2014). Coauthor Stewart Clegg is a leading organization theorist whose work has always been known for being historically informed (Clegg, 1989, 2015; Clegg & Dunkerley, 1980; McKinlay, Carter, Pezet, & Clegg, 2010), drawing inspiration from a variety of historical contexts, from the first century to the twentieth century (Rowlinson & Carter, 2002: 536). Vaara and Lamberg (2016) also personify the integration that they promote within and between history and strategy. Vaara has written extensively on strategy (e.g., Vaara & Whittington, 2012), while Lamberg is a professor of strategy and economic history whose research includes a historical analysis of corporate myths (Lamberg, Laukia, & Ojala, 2014).

Vaara and Lamberg derive three historical approaches to strategy practice and process research from perspectives within history: realist, interpretive, and poststructuralist. They then demonstrate how these approaches can be mapped onto paradigms in organization theory (e.g., Hassard & Cox, 2013) to produce complementary research agendas. This complementarity between different epistemological and ontological positions leads us to question whether the split between historians over questions of objectivity and relativism is as irreconcilable as some protagonists claim. Leading business historians (e.g., Jeremy & Tweedale, 2005; Toms & Wilson, 2010) have cited Evans's *In Defensc of History* (1997) to suggest that postmodernism can be safely ignored (Finney, 2005: 149). In fact, Evans (2001a) takes the relativist and postmodernist challenges seriously and has reiterated his view that historians need to be more self-conscious about theory and epistemology.

On the other side, advocates of the historic turn in organization studies (e.g., Mills, Weatherbee, & Durepos, 2013) tend to draw on historical theorists such as Munslow (2003), who

set out three more or less incommensurable epistemological positions in historiography in the form of a narrative of progression: from “naïve modernist” or *reconstructionist* history, which presents itself as an unmediated truthful account of the past derived from close scrutiny of sources, through “late modernist” or *constructionist* history, which self-consciously invokes social scientific concepts to reveal the underlying patterns in the past, to, finally, *deconstructionist* history, which is primarily a form of literature that derives its meaning as much from its representation of the past as from the sources or concepts used to interrogate those sources. Each position comes with its own set of rhetorical opportunities and constraints that enable scholars to tell, and legitimate, different versions of history. By allowing historical researchers to locate their approach in a matrix of alternatives or as complementary in relation to alternatives, rather than as a historical narrative of progress, Maclean et al. and Vaara and Lamberg both facilitate integration within and between history and organization studies.

HISTORY MATTERS

The assertion that history matters is a riposte to the form of rational choice methodological individualism that dominates neoclassical economic thinking, a perspective in which history does *not* matter. Milton Friedman’s (1953) classic essay articulates the value of ahistorical, stylized abstraction for microeconomic theorizing. A mild relaxation of assumptions from neoclassical economics, in relation to bounded rationality and knowledge asymmetry, gave rise to organizational economics. But Williamson’s (1975: 171) pronouncement that it was “not by history but by logic” that the owners of capital became the owners of enterprise should dispel the impression that organizational economics is more friendly to history. If the ownership of capital was merely a contingency of history or a noneconomically rational process that accounted for

human frailty, then, presumably, the economic institutions of our time may represent something other than the inexorable march of optimizing choices.

The historic turn can be seen as part of a more general reaction against the abstractionist imperialism of economics; it represents a continuation of a broader conception of rationality in order to admit a role for history. The concept of path dependence originates from economics and has been taken up in organizational theorizing. In early work in the resource-based view, Reed and Defillippi (1990) and Peteraf (1993) introduced the notion of path dependence into the strategy literature. The development of idiosyncratic and difficult to imitate firm-level assets and processes depended on historical processes where each move followed logically from previous investments by the firm's executives. For most of its history in strategy, path dependence has operated as a "noun," a construct invoked to explain idiosyncrasy, with the emphasis on the path of investment. Pierson (2004) wove together a richer, historically sensitive account of the verb "depend" in the construct to show how individual-, group-, and societal-level choices work to perpetuate decisions made at one time into the future. While strategy scholars have long admitted that history matters, organizational history constructs a more detailed, nuanced, and richer explanation of both *how (path)* and *why (dependence)* history matters.

The concept of path dependence has taken on a life of its own in organization theory (Sydow, Schreyögg, & Koch, 2009). From an institutionalist perspective, Suddaby et al. have cautiously criticized the economic version of path dependence for interpreting history "narrowly as a set of constraining contingencies" (2014: 108). They favor alternative notions of path dependence from political scientists, sociologists, and historians, where history is seen not so much "as constraint but as generating a series of specific moments of choice, each of which creates multiple paths of different historical trajectories or outcomes" (2014: 108).

History Doesn't Matter: Organizational Economics

Economists asserted that in its various guises—transaction cost economics, agency theory, and game theory—organizational economics represented a significant advance that could accommodate or explain the historical existence of firms as organizations in a way that the standard neoclassical theory of the firm did not, but *without* either contact with any sort of detailed history or a theory of history. The explanation for firms as organizations in terms of rational choice and methodological individualism, albeit partially relaxed as bounded rationality in transaction cost economics, appeared to impinge on organization theory as a field that had long been occupied by sociology. Transaction cost economics could be superimposed on history, supposedly to explain the organization of work and the progression from the putting-out system to the employment relationship (Williamson, 1980). Chandler's (1962, 1977) classic historical account of the modern corporation and the multidivisional form could also be interpreted in terms of transaction costs (Williamson, 1975, 1985).

Organizational economics appeared to offer the prospect of dialogue within and between the social sciences, and that dialogue continues with evolutionary variants of economics. There was talk of building bridges across the contested terrain between accounts of the employment relationship from mainstream and radical political economy (Goldberg, 1980), drawing on classic historical studies of the factory system inspired by Marx's (1976) examination of the labor process (Edwards, 1979; Marglin, 1974). But as an illustration of how to conduct historical analysis, Kieser (1994) set out a critique of the explanations for the demise of the putting-out system from both Marxian labor process theory and transaction cost economics, arguing that neither explanation took sufficient account of the historical evidence. The broader target for Kieser's critique was the use of history to illustrate general deductive models. Kieser (1994: 617) characterized this as a

form of historical sociology, although it is more commonly practiced by economists, as with Marglin's (1976/1974) and Williamson's (1985) accounts of putting-out that Kieser criticized, and more recently in Acemoglu and Robinson's (2012) popular book, *Why Nations Fail*. Kieser favors an "inductive strategy," exemplified by Weber's use of "ideal types."

Kieser is recognized as an important contributor to historiographical debate in organization studies (Newton, 2004), and he is notable for being one of the few organizational scholars who has looked at the history of organizations before the nineteenth century (Kieser, 1987, 1989, 1998). Kieser's own work therefore highlights the importance of temporal distance and the significance of the historic turn in moving away from a presentist focus on problems arising within organization theory and toward the application of organizational concepts to questions arising from an immersion in historiography. Presentism represents an attempt to recast the past in terms of the knowledge, concepts, and schema of the present period. Presentism distorts history and historiography by reifying what is current and justifying its truth by filtering the past (Zald, 2002). It manifests itself in organization studies in what could be called "the Simpsons method," in which accounts are given for fictionalized case study organizations in a nondated, extended present (Booth & Rowlinson, 2006).

Organizational History: The State of the Art

The once dominant debate between business history and organizational economics (Jones, 1997; Rowlinson, 2001), which business historians often saw as synonymous with management theory (Rosenbloom, 1997), has subsequently been carried on separately from the dialogue between business history and organization theory, in both critical (Freeland, 2001) and appreciative encounters (Langlois, 2007). Of the six major theoretical perspectives on

organizations outlined by Aldrich and Ruef (2006: 41), *Organizations in Time* includes chapters corresponding with four: ecological (Lippmann & Aldrich, 2014), institutional (Suddaby et al., 2014), interpretive (Rowlinson & Hassard, 2014), and organizational learning (Fear, 2014). The other two major perspectives—resource dependence and transaction cost economics—are barely mentioned by contributors to *Organizations in Time*. The chapters from the ecological, institutional, and interpretive or cultural perspectives provide thirty-one illustrative exemplars of historical or historically informed studies (see Table 1) and indicate a path forward in both understanding that history matters and showing how and why. Examining some of these exemplars therefore gives us insight into what is seen as constituting historical research from different perspectives in organization studies. Incidentally, the chapter on organization learning is written by a business historian, who treats it as a topic rather than a perspective. This in itself indicates the different understanding of theory in organization studies and business history, but the result is that a comparable list of exemplars is not provided for organizational learning.

Kipping and Üsdiken's (2014) survey of history in management and organizational theorizing eschews the historic turn in order to take a broader perspective than that of previous systematic reviews (cf. Leblebici, 2014; Rowlinson & Hassard, 2014), specifically avoiding the dialogue between business history and organization studies. These researchers, making a convincing case that there is more history in organization studies than might be expected, selected eighty-two historical studies for review. There is a risk, in a more inclusive approach, that research in organization studies that fails the test of dual integrity is simply relabeled as history on the basis of using historical data, or that almost all business history is simply relabeled as organizational history (cf. Leblebici, 2014: 73). What these various surveys reveal is that there is little consensus yet as to what would constitute an exemplar of organizational history, let alone a recognized canon.

Even so, it is surprising that only eight of the thirty-one historical exemplars identified from the theory chapters in *Organizations in Time* were picked up by Kipping and Üsdiken's (2014) review, and it interesting to speculate how so many came to be overlooked, especially those published in leading journals, such as Boje (1995) and Rojas (2010) in the *Academy of Management Journal*.

Neither Boje (1995) nor Rojas (2010) refers to history in their titles or abstracts, which may well explain why these papers were overlooked by Kipping and Üsdiken (2014), but, arguably, both papers are, in fact, more historical than much research in organization studies that authors do pronounce as historical. Both Boje and Rojas discuss historical theory and methods and anticipate objections from organization theorists. There is a paradox in that the more historical research actually is in organization studies, in terms of dual integrity, the less likely authors are to proclaim it as historical. This has been characterized as “history under cover” (Maielli, 2006). By contrast, research pronounced as historical is more likely to take the kind of “historical perspective” that uses the past to study the present, or to shed light on current organization theories, with history providing “the raw materials” rather than the object for analysis in its own right (Lawrence, 1984).

Taking such a limited historical perspective in organization studies therefore does not necessitate the kind of authentication that would qualify it for dual integrity (Maclean et al., 2016); the paraphernalia of verification that is seen as synonymous with history by most historians (Evans, 1997) is not required. As Kipping and Üsdiken (2008) themselves once complained, longitudinal or serial history (Rowlinson, Hassard, & Decker, 2014) is often equated with historical research in organization studies. Nevertheless, there is a spectrum of serial history, and Kipping and Üsdiken (2014) miss several significant studies at the more interpretive end that use “content analysis of archival documents composed of qualitative textual data” (Sonpar & Golden-Biddle, 2008: 795).

Shenhav (1995, 1999; Shenhav & Weitz, 2000) in particular demonstrates that the positivistic move to serial history is by no means restricted to functional or economic ontological theories of historical change.

Shenhav's (1999) elaborations on method make it clear that there is no contradiction between constructivist epistemological positions and quantitative serial history. The period covered by Shenhav (1879–1932) also sets his work apart from many of the other exemplars of historical research in organization studies. Most articles with a clear periodization begin after 1945, and of those that cover a period before 1945, only a few are quantitative. Most researchers forgo making a contribution to historiographical debate in favor of finding a readily downloadable historical dataset amenable to sophisticated methods for testing theoretically derived hypotheses. By contrast, Shenhav faced the major task of manually analyzing sources, counting the number of pages where the term *system* was used in the primary sources—engineering trade journals. The intrinsic *historical* interest of Shenhav's studies lies in their singularity—the historical origins of organization studies—rather than in testing organization theory or refining research techniques.

Toward a Productive Future

Kipping and Üsdiken's (2014) survey demonstrates the extent to which it is now accepted that history matters in organization studies, but the bias is still toward an objectivist view of history. As Suddaby, Foster, and Trank argue, “This traditional view is based on a narrow and limited understanding of history, one in which the past is an extant and immutable representation of reality” (2010: 149), and it is a view that few historical theorists share. Increasingly, both historically inclined organization theorists and business historians who are receptive to organization theory (Hansen, 2007, 2012) recognize that historical actors are enabled and

constrained not only by the past, in the form of technology, institutions, and social structures, but also by representations of the past, including history itself. Arguably, it would be more accurate to say that the past matters, but history is always rhetorical. Recognizing the importance of representations of the past leads to an engagement with memory, and the concept of collective memory is receiving increasing attention in organization studies in relation to history, as evidenced by the widespread interest in the idea of “rhetorical history,” which draws on the memory-related historiographical concepts of invented tradition (Hobsbawm & Ranger, 1992) and imagined communities (Anderson, 2006).

For both Lippmann and Aldrich (2016) and Ocasio et al. (2016), the concept of collective memory is central in their contributions to extending our understanding, respectively, of entrepreneurship and institutional logics. They both also demonstrate that the style and methods of organization theory, with propositions (Lippmann & Aldrich, 2016) or a model (Ocasio et al., 2016), can be combined with historiographical concepts. Lippmann and Aldrich start from the growing recognition that history matters, and they extend this to include the shared understanding, or collective memory, of the same historical experiences within generational units. The process of entrepreneurship and its continued flourishing depend on more than individual traits or a set of objective opportunities in the economic marketplace (Alvarez & Barney, 2007, 2010). Entrepreneurship is clearly socially embedded, in terms of the hunt for resources, but Lippmann and Aldrich argue that it is also historically embedded and molded by what came before, both locally and globally. They draw on historical illustrations to develop a series of historically informed propositions concerning “pioneering entrepreneurs” and “entrepreneurial generational units.” They also provide an account of how today’s entrepreneurs work to historically enable the next iteration of economic growth and innovation.

Ocasio et al. (2016) incorporate collective memory into their historical model of societal logics. They bring together two bodies of literature in organization theory—organizational memory (Casey, 1997; Casey & Olivera, 2011; Walsh & Ungson, 1991) and institutional logics (Thornton, Ocasio, & Lounsbury, 2012)—in a way that recognizes the historical implications of both fields. In order to illustrate their model, they use the example of corporate logic in the United States between 1860 and 1920. What is particularly interesting in relation to a more rhetorical take on history is the way the authors use historical texts from the past as sources to show that by 1920 historians were already writing histories of big business looking back to the Civil War. In other words, history itself, as a narrative of the past from the past, can be used as evidence for collective memory.

HISTORY THAT MATTERS

Historiography teaches us that history, properly understood, is much more than a series of past events; past events must be seen from some perspective, and the introduction of new perspectives yields a past not “set in stone” but contested and continually rewritten. Put simply, rather than a solid edifice that frames the present, history represents a malleable substance that actors mold and shape to justify future actions when seen from a particular historical moment. History operates as a tool that social actors use in discourses designed to gain or employ power, as well as to legitimate and moralize the exercise of that power.

The writing of history, sociology, or economics represents a rhetorical discourse in a manner that extends beyond the “mere rhetoric” of linguistic tropes and scientific convention (McCloskey, 1998). Rhetoric, from the tropes of article organization to the substantive norms surrounding appropriate empirical tests (e.g., $p < 0.05$), works to make scholarly inquiry translatable and understandable across fields, but also to assert legitimacy and power within and

across the academy (e.g., see Cohen, 1995). In the discourse of science, history certainly matters, and one of its key contributions is to serve as a rhetorical tool. In the rhetoric of organization studies, work that “constitutes a theoretical contribution” (Whetten, 1989) moves the field forward. History matters for good theorizing, although it need not result in formal propositions or 2 x 2 matrices, two important rhetorical tools in management (Booth, 2009). Organizational history proves more difficult to employ in discourse because defining history proves more difficult than defining an organization (see Foreman & Whetten, 2002, for an example of contests over the definition of organization). When historians ask themselves, “What is history?” they are generally sanguine about the difficulty of answering the question. Landes and Tilly, for example, revel in the revelation that, for history,

there is no such thing as an introductory core course that aims to convey the essence of the subject. Nor is there any pretense to an orthodoxy—whether in the problems to study, the methods to employ, or the standards to meet (1985: 262).

This does not imply that the definition of history can be reduced to the tautology of “what historians write” (Corfield, 2007: xvi), but simply reminds us that history is even more diffuse than organization studies. In one of the best history primers, Jordanova (2006) argues that instead of trying to define history as a discipline, it is more useful to think of it as a set of *practices* and *commitments*, which constitute rhetorical rules that guide historical discourse. These include epistemological and ontological commitments in relation to the past and its representation; narrative strategies for ordering and presenting accounts of the past; the use of primary sources and agreed procedures for disclosing sources; and the expectation of an engagement with historiography, in terms of contributing to historiographical debates, identifying gaps in

historiographical knowledge, and composing historical accounts. Even these practices and commitments tend to be debated among historical social scientists (e.g., Bonnell, 1980).

History and the Dark Side of Organization

In much of mainstream economic and organization theory, scholars work from a constructionist position (Munslow, 2003) that entails the search for universal principles operating independently of perspective, but we find it difficult to disagree with the deconstructionist view that any historical engagement with the past involves concepts, theories, arguments, and ethical beliefs, whether or not these are acknowledged. The inescapable entwining of history with morality and social impact leads, for us, to the need for organizational scholars to engage with historical topics of social and moral relevance.

Organization studies face the challenge of combining methodological and theoretical rigor with managerial relevance (Gulati, 2007). Organizational history faces a related challenge of combining theory with history that matters, either for wider historiographical debates or for individual, organizational, or collective memory and identities. The challenge for organizational history arises both from historians, who tend to overlook organization theory, and scholars working in critical management studies, which are closely aligned with the historic turn. Historians have increasingly highlighted the organization and involvement of business in larger social phenomena, such as slavery and racism, as well as specific historical moments, such as the Holocaust.

Scholars working in critical management studies argue that these controversial topics are neglected in favor of the “the 4 Rs of relevance, recency, results and redemption” (Burrell, 1997: 190). From a critical perspective, the reliance on “managerial sensibility to shape research questions” in management research (Gulati, 2007: 780) almost inevitably leads to a neglect of

history in general and, in particular, the dark side of organizations, such as management complicity in war, slavery, and racism. Even so, there are differences between the implied critique from history and the explicit critique of organization theory from critical management studies. For example, most historians look with a wary eye on attempts to extract lessons from the past through historical analogy (Evans, 1997: 59; Jordanova, 2006: 5), whereas there is an irrepressible utilitarian urge to justify history in terms of lessons to be learned even in supposedly critical management studies (e.g., Martí & Fernández, 2013).

From a critical management studies perspective, Cooke (2003) has made a convincing case that antebellum slavery in the southern United States either is not mentioned in management and organization studies or else is mentioned only in order to be dismissed as more or less irrelevant to the development of modern management. Chandler at least gave careful consideration to the matter of slavery, but he concluded that “the southern plantation, although it required some subdivision of labor and some coordination of the activities of the work force, had little impact on the evolution of the management of modern business enterprise” (1977: 66). So, as Cooke puts it, classic management texts continue to “locate slavery outside the development of modern management” (2003: 1899). This even seems to apply to more critical texts, such as Perrow’s *Organizing America: Wealth, Power, and the Origins of Corporate Capitalism*, where the opaque explanation for not considering the role of slavery in the “first modern business” is buried in an endnote:

I am ignoring slavery, which was, of course, an extreme form of dependency. This form of wage dependency is obvious and something we do not accept today. I am dealing with the kinds of wage dependency that we continue to take for granted and accept (2002: 75, 240, note 15).

The neglect of slavery is difficult to sustain in the face of growing concern with “modern slavery” in the supply chains of contemporary corporations (Crane, 2013) and historians’ increasing interest in the business and management of slavery. Roediger and Esch (2012: 23) specifically focus on the relationship between management and race in the United States, claiming that “slave labor and race management were central to how workers came to be bossed” (2012: 23). Ruef and Harness (2009) offer a comparative perspective on slavery, suggesting that the distinct legitimacy challenges faced by Roman landowners produced a management ideology that was fundamentally different from that revealed in the texts of U.S. planters. The revival of political economy in U.S. university history departments, with a prolific output labeled “the history of capitalism” (Shenk, 2014), specifically focuses on the role of business in slavery. Coates (2014) has revived the case for reparations, with a focus on discrimination and disadvantage from emancipation to the present, especially in housing. In his provocative history of slavery and U.S. capitalism, Baptist (2014: e.g., 140–141) repeatedly refers to enslavers as “entrepreneurs,” whose main innovation was in modern methods of torture for use in their slave labor camps. Irrespective of one’s stance on the relationship between slavery and capitalist development, the fact remains that societies with chattel slavery had large numbers of self-employed business people and overseers engaged in running complex organizations (Ruef & Reinecke, 2011; Schermerhorn, 2015), yet these enterprises fit uncomfortably into modern conceptions of “entrepreneurship” or “management.”

The Opportunity for Organizational History

The problem for management and organization studies is that the historiography of slavery and its legacy for race relations is necessarily contested (Ruef, 2014; Walker, 2004) and can never

deliver the kind of platitudes that management textbooks can present as lessons to be learned. We see an opportunity here for organizational history to make an informed contribution about the managerial and organizational aspect of slavery in the past and its relation to current and ongoing issues of race and discrimination, similar to the way Godfrey (2013) identifies the role of history in the institutions of poverty. Businesses are often portrayed (and work hard to be portrayed) as “blind” to all the “isms” that permeate the larger society: sex, race, and age. Organizational history likely provides a more nuanced account, one that will undoubtedly combine cultural and historical lack of vision with intentional and deliberate blinders regarding the business of slavery.

One way to incorporate history that matters into organization theory is to examine corporate responsibility for past actions, as both Schrempf-Stirling et al. (2016) and Mena et al. (2016) have done. This approach gives history the kind of contemporary relevance required by business schools without degenerating into the sort of simplistic lessons to be learned from history that historians are wary of. Considering responsibility for past actions almost inevitably involves examining how those actions have been represented, including their representation by historians, which leads to a more rhetorical view of history. Both Schrempf-Stirling et al. and Mena et al. (2016) draw heavily on Ricoeur’s (2004) last monumental work, *Memory, History, Forgetting*, to highlight the contested nature of historical narratives. But they take very different approaches to the questions of memory and corporate social responsibility, which is why it is well worth considering them side by side.

Schrempf-Stirling et al.’s (2016) concept of “historic corporate social responsibility” (historic CSR) will surely come to be seen as marking a historic turn in the ever-expanding field of CSR. They combine an intuitively appealing 2 x 2 matrix of “narrative contests over the corporate past” with well-chosen historical illustrations, such as Volkswagen’s response to its Nazi

past and involvement in forced labor. They ask, “Can we impose our own categories of CSR on the past if past actors did not have our set of options available?” (2016: 707). Answer this not only necessitates a reflection on or historicization of contemporary categories of CSR but also an immersion in critical historiography for any particular historical case.

Mena et al. (2016) draw on Ricoeur’s work to explore how managers frame and massage the rhetorical elements of historical events (the presentation, interpretation, and remembrance) in a deliberate attempt to shape how larger audiences view instances of negative social performance or acts of social irresponsibility. Events may have an objective character, but beyond the occurrence of an event of “corporate social irresponsibility,” managers employ a set of rhetorical tools that mold, shape, and sustain how an event is interpreted and remembered. The power of their work lies in laying bare the reality that history is created and maintained for moral and moralizing purposes. Historic CSR focuses on the importance of remembering, but Mena et al.’s concept of “forgetting work” confronts the paradox that even when an organization accepts full responsibility for its irresponsibility in the past, this can result in a once-and-for-all show of remorse that leads to forgetting later on.

CAUTIONS AND CONCLUSIONS

We believe that the articles in this special topic forum represent some of the best work to date on organizational history, and we look forward with a hopeful gaze toward the potential of organizational history to contribute valuable insights to organization studies. We pause here, however, to introduce a note of caution. From a critical and interpretive perspective, Stager Jacques (2006: 39) has provocatively suggested that much of what counts as history in organization studies would actually make “an excellent compendium of what history is not.” Likewise, there have been

repeated complaints about the “paucity of historical analysis and debate within organization studies” (Newton, 2004: 1364, 2010: 1370). The first actual reference to a “historic turn” in organization studies was, in fact, ironic, posing a rhetorical question as to whether such a turn was feasible even as history appeared to be gaining greater acceptance (Clark & Rowlinson, 2004). If historiography is taken to mean exploring “the multiplicity of intentions and influences” in historical writing, then the historiography of historical writing in organization studies is still at an early stage compared to the much broader field of historical sociology (Greenwood & Bernardi, 2014: 912). A historical reorientation of organization studies was never likely; the most that could be hoped for was that history would be integrated into theory development, rather than relegated to a supplementary role of testing theory (Üsdiken & Kieser, 2004).

On an abstract level, the historic turn represents a hypothetical dialogue between historical theory and organization theory (Rowlinson et al., 2014), but the idea of a synthesis between history and organization studies might appear somewhat presumptuous to historians, even if they noticed the call for it. History is arguably as old as writing itself, a self-conscious genre of writing found in almost all literate societies (Burrow, 2009). Even in its modern Western professional form, the history of history goes back several centuries. By comparison, many historians would probably see organization studies as a parvenu, an overgrown interdisciplinary subfield awash with funds from business schools but compelled to claim forerunners from other disciplines in an effort to legitimate its lineage within the university. Weber, for example, who is often identified in management textbooks as a founder of the so-called Classical School, was a lawyer, historian, economist, philosopher, political scientist, and sociologist, but an organization theorist only in retrospect (Cummings & Bridgman, 2011: 82). With the welcome exception of Munslow (2015), few historical theorists appear to have been enticed to join a dialogue with organization studies

scholars. In practice, there has been a fruitful dialogue between particular constituencies of organization theorists and business historians who believe there is scope for more “historical research and reasoning” in management and organizations studies (Wadhvani & Bucheli, 2014: 3).

Another critique of business history, and an area of concern for organizational history, is that its focus on in-depth examinations of archives related to particular organizations, management practices, or industries leads scholars away from broader questions that bear on the evolution of capitalism. Even at their best, historical case studies of large industrial corporations tend to view management and organization through the lens of highly successful businesses (Freeland, 2005). Organizational history must continue to focus on larger issues within the conversation of management theory in order to account for and incorporate the historical dynamics that affect smaller entrepreneurs and traditionally marginalized groups. Without this breadth of inquiry, more dubious forms of enterprise slide from view and escape a needed critical examination. The relationship of slavery to industrial capitalism, which we discussed earlier, is likely to be overlooked if organizational history follows business history in focusing only on successful contemporary organizations. The loss to organization studies is another missed opportunity to “make a difference” (Hambrick, 1994).

History itself is part of humanity’s primordial reckoning with time, a manifestation of the “historical condition” in literate societies, where “we make history, and we make histories, because we are historical” (Ricoeur, 2004: 284). Organizations, as vital elements within societies, will continue to generate historical interest in their narrative identities, whether or not corporate histories are commissioned from academic business historians. Management practitioners will continue to look for lessons from history, whether or not they are provided by organization studies.

For organization studies the interpretive methodological challenge is to move away from seeing history as a repository of facts from the past for testing theory and to engage with history as historiography and as a sense of the past. It is to create organizational history.

TABLE 1

Thirty-One Illustrative Exemplars of Historical and Historically Informed Studies from Suddaby, Foster, and Mills (2014), Lippmann and Aldrich (2014), and Rowlinson and Hassard (2014)

Source		Citation ^a	Publication	Cited by Kipping & Üsdiken (2014)
Suddaby et al. (2014)		Leblebici, Salancik, Copay, & King (1991)	<i>Administrative Science Quarterly</i>	Yes
		Hargadon & Douglas (2001)	<i>Administrative Science Quarterly</i>	Yes
		Hoffman (1999)	<i>Academy of Management Journal</i>	No
		Suddaby & Greenwood (2005)	<i>Administrative Science Quarterly</i>	No

		Maguire & Hardy (2009)	<i>Academy of Management Journal</i>	No
		Arndt & Bigelow (2005)	<i>Administrative Science Quarterly</i>	Yes
		Rojas (2010)	<i>Academy of Management Journal</i>	No
		Holm(1995)	<i>Administrative Science Quarterly</i>	Yes
		Schneiberg (2007)	<i>Socio-Economic Review</i>	No
		Dobbin (1997)	Book	Yes
		Cooper, Hinings, Greenwood, & Brown (1996)	<i>Organization Studies</i>	No
		Hirsch & Bermiss (2009)	Book chapter	No
		Dacin, Munir, & Tracey (2010)	<i>Academy of Management Journal</i>	No
Lippmann & Aldrich (2014)		Dobbin (2009)	Book	No

		Pozner, Stimmler, & Hirsch (2010)	Book chapter	No
		Johnson (2007)	<i>American Journal of Sociology</i>	Yes
		Muehlfeld, Rao Sahib, & Van Witteloostuijn (2012)	<i>Strategic Management Journal</i>	No
		Ingram & Lifschitz (2006)	<i>American Sociological Review</i>	No
		Joseph & Ocasio (2012)	<i>Strategic Management Journal</i>	No
		Langton, 1984	<i>Administrative Science Quarterly</i>	Yes
		Lippmann (2010)	<i>Journal of Broadcasting & Electronic Media</i>	No
Rowlinson & Hassard (2014)		Lipartito (2004)	Book chapter	No
		Walker (2004)	Book chapter	No

		Guthey (2004)	Book chapter	No
		Mayhew (2009)	Book	No
		Decker, 2010	<i>Journal of Management Studies</i>	No
		Mills (2006)	Book	No
		Durepos, Mills, & Helms Mills (2008)	<i>Management & Organization History</i>	No
		Bruce & Nyland (2011)	<i>Organization Studies</i>	Yes
		Boje (1995)	<i>Academy of Management Journal</i>	No
		Hansen (2007)	<i>Enterprise & Society</i>	No

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