



Review

Conceptualizing Historical Organization Studies

Journal:	<i>Academy of Management Review</i>
Manuscript ID:	AMR-2014-0133-STFHOS.R3
Manuscript Type:	Special Research Forum History & Organization Studies
Keywords:	Organizational Theory (General), Organizational History, Philosophy (Epistemology, Ontology), Methodological Critique

SCHOLARONE™
Manuscripts

CONCEPTUALIZING HISTORICAL ORGANIZATION STUDIES

Mairi Maclean

Newcastle University, UK

mairi.maclean@ncl.ac.uk

Charles Harvey

Newcastle University, UK

Charles.Harvey@ncl.ac.uk

Stewart R. Clegg

University of Technology, Sydney, Australia

Stewart.Clegg@uts.edu.au

Acknowledgement. We wish to thank our colleagues Joan Allen, Helen Berry, Jeremy Boulton, Frank Mueller, John Sillince and Roy Suddaby for their perceptive comments on earlier versions of this manuscript. The paper also benefitted from discussions at the Centre for Management and Organizational History Workshop (2011) at Queen Mary University of London, the Association of Business Historians conference (2014) at Newcastle University Business School, the EGOS SWG on Historical Perspectives in Organization Studies, and the EGOS sub-plenary session on Re-imagining History in Unsettled Times at Rotterdam (2014). Most especially we would like to thank Martin Ruef, associate editor at *AMR*, and three anonymous reviewers whose valuable suggestions helped sharpen our arguments during the review process.

CONCEPTUALIZING HISTORICAL ORGANIZATION STUDIES

Abstract

The promise of a closer union between organizational and historical research has long been recognized. However its potential remains unfulfilled: the *authenticity of theory development* expected by organization studies and the *authenticity of historical veracity* required by historical research place exceptional conceptual and empirical demands on researchers. We elaborate the idea of *historical organization studies*, organizational research that draws extensively on historical data, methods and knowledge to promote *historically informed theoretical narratives* attentive to both disciplines. Building on prior research, we propose a typology of four differing conceptions of history in organizational research: history as evaluating, explicating, conceptualizing, and narrating. We identify five principles of historical organization studies – *dual integrity*, *pluralistic understanding*, *representational truth*, *context sensitivity* and *theoretical fluency* – and illustrate our typology holistically from the perspective of institutional entrepreneurship. We explore practical avenues for a creative synthesis, drawing examples from social movement research and micro-history. Historically informed theoretical narratives whose validity derives from both historical veracity and conceptual rigor, afford dual integrity that enhances scholarly legitimacy, enriching understanding of historical, contemporary and future-directed social realities.

Keywords

Historical Organization Studies, Organization Theory, Epistemology, Narrative, Research Methods.

1
2
3 The promise of a closer union between organizational and historical research has long been
4 recognized (Kieser, 1994; Zald, 1996). Yet the potential of history to enrich and transform
5 our understanding of contemporary organizations and organization theory remains unfulfilled
6 (Clark & Rowlinson, 2004; Kieser, 1994; Zald, 1993). Much of organization theory tends to
7 downplay “the exceptional value of the long time span” (Braudel, 1980: 27). History,
8 signifying both the past as experienced by actors and the narratives historians weave from
9 this (Mills, Weatherbee, & Durepos, 2013; Rowlinson, Hassard, & Decker, 2014), often stays
10 hidden in organizational research.
11
12
13
14
15
16
17
18
19

20
21 The purpose of this paper is to explore the potentialities for a creative synthesis
22 between history and organization studies as endeavours that share common ground. We
23 define *historical organization studies* as organizational research that draws extensively on
24 historical data, methods and knowledge, embedding organizing and organizations in their
25 socio-historical context to generate historically informed theoretical narratives attentive to
26 both disciplines; alert to changing interpretations of meaning over time and “the residue or
27 sedimentation of prior templates” (Suddaby, Foster, & Mills, 2014: 113). The term “historical
28 organization studies” (Flyvberg, 2006; Greenwood & Bernardi, 2014; Lippmann & Aldrich,
29 2014; Rowlinson & Hassard, 2013) is arguably of more recent provenance than that of
30 “organizational history” (Booth & Rowlinson, 2006; Leblebici, Salancik, Copay, & King,
31 1991; Rowlinson et al., 2014), relative to which it has been used less widely. Here we deploy
32 the construct to denote organizational research to which history is integral, in which history
33 and organization studies are of equal status, underpinned by the notion of *dual integrity*, as
34 opposed to the history of a specific organization or set of organizational circumstances
35 (Leblebici, 2014).
36
37
38
39
40
41
42
43
44
45
46
47
48
49
50
51
52

53
54 The field of organization studies is generally recognized as comprising a broad
55 church, “an eclectic subdiscipline of social science approaches that bridges organization and
56
57
58
59
60

1
2
3 management theory, organizational behaviour, organizational psychology, and the sociology
4
5 of complex organizations” (Zald, 1993: 513). At core is the desire to better understand how
6
7 actors constrained by social forces fashion organizational structures and practices that frame
8
9 societal relations and institutions, impinging on individuals and communities (Clegg &
10
11 Bailey, 2008). Yet to date organization studies has been limited by its orientation towards the
12
13 synchronic, privileging contemporary, cross-sectional studies covering limited time-spans
14
15 (Roe, Waller & Clegg, 2008; Zald, 1996). There is much to gain from greater incorporation
16
17 of history as a dynamic process not “sliced into discrete moments” (Bryant & Hall, 2005:
18
19 xxix). Organization studies, as a social science, stands to benefit from a more intense
20
21 engagement with history as a means of infusing greater realism and substance; affording
22
23 opportunities for access to structures and categories of knowledge hitherto under-explored, as
24
25 Wallerstein (2004) shows in his theoretical-historical elaboration of world-systems dynamics.
26
27 Through comparative analysis of temporal and spatial similarities and differences, fresh
28
29 concepts may be developed and new insights emerge (Delbridge & Fiss, 2013; Ruef, 2012;
30
31 Suddaby, Hardy, & Huy, 2011).

32
33
34
35
36 History, in turn, has been limited by an insufficiently rigorous engagement with
37
38 theory. This has led to problem misrecognition and analytical and interpretive failings, as in
39
40 the exaggerated claims made for the impact of railroads on US economic growth before the
41
42 application of counterfactual reasoning and “cliometric” techniques, combining theory and
43
44 quantitative methods (Fogel, 1964, 1970; Ferguson, 1997). Business and management
45
46 history, especially, has much to gain from deeper association with organization studies whose
47
48 theoretical insights might open up fresh avenues of analysis and interpretation (Rowlinson et
49
50 al., 2014).

51
52
53
54 The challenge for historical organization studies, stated simply, is to integrate history
55
56 and theory, overcoming the aversion to theory of historians and the neglect of historical
57
58
59
60

1
2
3 processes by organization theorists. Rowlinson et al. (2014) identify a particular case of a
4
5 more generic problem when they address the relationship between organization studies and
6
7 history: that of spanning field boundaries (Fligstein & McAdam, 2012). Spanning boundaries
8
9 demands two-way ontological and epistemological understanding and a willingness to engage
10
11 with “the other”. The past, for the philosopher historian Michel de Certeau (1988: 5), is
12
13 “other” time, a past that discourse sutures to the present while simultaneously “*dissociating*”
14
15 one another. De Certeau (1988: 5) considers hearing “what the other keeps silent” as
16
17 fundamental to deepening understanding. It is not just what we discern and apprehend that
18
19 matters; what escapes our notice may be equally important (Decker, 2013). The limited
20
21 permeability of field boundaries hampers the cultivation of relationships with historical
22
23 otherness, curbing cross-pollination and the building of conceptual and methodological
24
25 bridges, obstructing “conversation in the field[s] and dialogue with other disciplines”
26
27
28
29
30 (Hansen, 2012: 693; Gulati, 2007).

31
32 Organization studies, we propose, should look outward to engage more fruitfully with
33
34 history, whilst explicitly recognizing the difficulties of working across field boundaries to
35
36 create a new space for academic enquiry. We aim to demonstrate how history might enrich
37
38 organizational theory (Kieser, 1994), posing two guiding research questions. First, *how might*
39
40 *the enterprise of organization studies be enriched through greater, more meaningful*
41
42 *engagement with history, historical sources and historical methods?* Second, *what form(s)*
43
44 *might such a dialectical engagement or creative synthesis of historical organization studies*
45
46 *assume?* We elaborate four distinct conceptions of history in organization studies to establish
47
48 a typology on which historical organization studies might be built, populating its cells with
49
50 examples of pertinent organizational theories. Following this we identify five key principles
51
52 that inform historical organization studies – *dual integrity, pluralistic understanding,*
53
54 *representational truth, context sensitivity, and theoretical fluency* – illustrating our typology
55
56
57
58
59
60

1
2
3 holistically from the perspective of institutional entrepreneurship. We explore avenues for a
4
5 creative synthesis in practice and reflect on the future potentialities for theory development in
6
7 historical organization studies.
8

9 10 **CONCEPTIONS OF HISTORY IN ORGANIZATION STUDIES**

11
12 The epistemological paradigms embraced by organization studies and history may
13
14 appear *incommensurable*, placing irreconcilable conceptual and empirical demands on
15
16 researchers (Kuhn, 1970; Steinmetz, 2007a). The work of Kieser (1994) and Zald (1993,
17
18 1996) has nevertheless spawned a growing tradition of writing on the subject (Booth &
19
20 Rowlinson, 2006; Clark & Rowlinson, 2004; Mills et al., 2013; Rowlinson & Hassard, 1993).
21
22 Lamenting the lack of progress made in infusing organization studies with historical
23
24 perspectives, Üsdiken and Kieser (2004) offer three potential remedies: history might
25
26 “supplement” social science within organization studies; history and organization studies
27
28 might be “integrated”; most radically, organization studies might be “reoriented” towards
29
30 history and greater humanism. The position we take in what follows is “integrationist”,
31
32 predicated on a union between organization theory and historical analysis. We dismiss
33
34 supplementing as tokenistic and reorientation as unrealistic in urging organization theorists to
35
36 go against the grain of social scientific tradition.
37
38
39

40
41 Recent research has played a major role in intensifying the debate (Bucheli &
42
43 Wadhvani, 2014; Kipping & Üsdiken, 2014; Leblebici, 2014; Lippmann & Aldrich; Suddaby
44
45 et al., 2014; Wadhvani & Jones, 2014). Rowlinson et al. (2014) in particular have sharpened
46
47 the analytical focus by highlighting three epistemological dualisms – explanation, evidence
48
49 and temporality – between organization studies and traditional narrative history:
50
51 organizational research privileges analysis over narration, self-generated data over
52
53 documentary sources, and chronology over periodization. The distinction between the
54
55 narrative and social scientific types of history is encapsulated in the debate between Fogel
56
57
58
59
60

1
2
3 and Elton in *Which Road to the Past?* (1983). Traditionalists such as Elton follow
4
5 Collingwood (1993: 419) in asserting that narrative is inseparable from the idea of history.
6
7 Fogel, conversely, champions the “rigorous testing” of social science theories (Fogel &
8
9 Elton, 1983: 32). Narrative historians are reticent in revealing the principles underlying their
10
11 research (Collingwood, 1993: 389), favouring the implicit embedding of theory within
12
13 analysis, while social scientific history champions hypothesis testing and the explicit
14
15 articulation of theoretical constructs (Fogel, 1970; Kousser, 1980; McCloskey, 1991). The
16
17 two schools are also differentiated by their approaches towards interpretation, the former
18
19 advocating a skilful interplay of inductive and deductive reasoning, the latter drawing its
20
21 inferences more directly from theory, evidence and analysis (Aron, 1959).
22
23
24

25 Kipping and Üsdiken (2014), recognizing the importance of these distinctions,
26
27 advance the debate by suggesting three ways in which history might relate to organization
28
29 theory at the macro and micro levels of analysis: first, as a means of testing theory (which
30
31 they term “history *to* theory”); second, as a means of informing theoretical perspectives
32
33 (“history *in* theory”); third, as a means of incorporating historical complexity within the
34
35 theorization process itself (“historical cognizance”). These are valuable ideas on which we
36
37 build. In doing so, our objective of dual integrity implies reaching beyond cognizance to a
38
39 unified, principled, historical organization studies integrating organization theory and
40
41 historical analysis. Lippmann and Aldrich (2014) propose evolutionary theory as offering a
42
43 potential integrative domain, recognizing even-handedly the importance of context in
44
45 conjunction with the articulation of generalized organizational processes (Aldrich & Ruef,
46
47 2006). Wadhvani and Jones (2014) likewise stress the importance to historical
48
49 entrepreneurship theory of transcending chronology to reveal the interrelationships between
50
51 actions and events. Despite this *rapprochement*, scholars from both history and organization
52
53 studies, Leblebici (2014: 56) suggests, need to express their differing ontological and
54
55
56
57
58
59
60

1
2
3 epistemological positions more clearly, especially how “their unique perspectives lead not
4 only to substantive debates but also an eventual integration”. In what follows we build on
5 these ideas to propose that the division between the narrative and social scientific modes of
6 historical research and writing help point the way toward a creative synthesis between history
7 and organization studies, engendering “substantive and insightful understanding of human
8 agency by leveraging their disciplinary differences” (Leblebici, 2014: 66).
9
10
11
12
13
14
15

16 Organizations are structures of sedimentation, where change is often invisible to the
17 observer (Clegg, 1981; Cooper, Hinings, Greenwood, & Brown, 1996). However, this does
18 not mean that the potentialities of history in organization studies have gone unnoticed. We
19 concur with Kipping and Üsdiken (2014) that organizational research contains more history
20 than commonly “meets the eye”. Several prominent theoretical strands within organization
21 studies are informed by a historical dynamic, albeit often unstated. Organizational theories
22 implicated by history that exhibit historical awareness include path dependence (David, 1985;
23 Arthur, 1989; Sydow, Schreyögg & Koch, 2009) and cognate theories such as imprinting
24 (Stinchcombe, 1965; Johnson, 2007) and structural inertia (Hannan & Freeman, 1984); the
25 resource based view of the firm (Wernerfelt, 1984) and dynamic capabilities (Teece, Pisano,
26 & Shuen, 1997); organizational ecology (Hannan & Freeman, 1977; Nelson & Winter, 1982;
27 Ruef, 2004; Ruef & Patterson, 2009); institutionalism (Leblebici et al., 1991; North, 1990;
28 Rojas, 2010; Suddaby et al., 2014); postmodernist and Foucauldian perspectives on
29 genealogy (Foucault, 1979; Newton, 2004); organizational memory (Rowlinson, Booth,
30 Clark, Delahaye, & Procter, 2010); and strategy and strategic change (Raff, 2000). Our
31 intention is not to discuss individual theories, but to think more holistically about
32 conceptualizing the foundations for historical organization studies; the emergence of a
33 creative synthesis depending crucially on building on common ground where it exists
34 (Kipping & Üsdiken, 2014). To this end, in Figure 1 we delineate four distinct conceptions of
35
36
37
38
39
40
41
42
43
44
45
46
47
48
49
50
51
52
53
54
55
56
57
58
59
60

1
2
3 history in organization studies, offering a foundational model for the future development of
4
5 historical organization studies.
6

7
8 -----
9 Insert Figure 1 about here
10 -----

11
12 Two important distinctions underpin our typology. The first relates to the *purpose* of
13 incorporating history in organizational research. The classic view is to conceive of history as
14 *interpretation*, as a means of explaining the present through the identification of
15
16 (dis)continuous social forces or causal chains bearing upon it (Collingwood, 1993; de
17
18 Certeau, 1988). Interpretation as a guiding purpose contrasts with history conceived as a
19
20 resource that enables the *exposition* and substantiation of ideas, constructs and theories
21
22 (Aron, 1959; Newton, 2004). The second distinction relates to *mode of enquiry*. In the social
23
24 scientific approach, theorization is explicit, oriented to the identification of overall patterns,
25
26 processes and generalizations as the primary goal (Fogel, 1970; McCloskey, 1991).
27
28 Conversely, in the narrative mode, the expression of theoretical ideas remains embedded
29
30 within the story being told (O'Connor, 2000). When these two dimensions of *purpose* and
31
32 *mode* are juxtaposed, a typology of four distinct conceptions of historical organization studies
33
34 emerges, each with different potentialities for organization studies: namely, *history as*
35
36 *evaluating*; *history as explicating*; *history as conceptualizing*; and *history as narrating*. In
37
38 what follows, we elaborate each conception with reference to illustrative organizational
39
40 theories that fit within the cells of our typology (or complicate it – some, like path
41
42 dependence, straddling more than one cell). This framework provides a conceptual
43
44 foundation for envisioning a more fully informed, sensitive, reflexive approach to historical
45
46 organization studies and the conditions needed to achieve a creative synthesis (Rowlinson et
47
48 al., 2014); adding to the overarching body of organizational scholarship by demonstrating
49
50
51
52
53
54
55
56
57
58
59
60

1
2
3 how disparate streams of historical research may be synthesized according to their purpose
4
5 and mode of enquiry.
6
7

8 **History as Evaluating**

9
10 The primary focus of this type of research is theoretical, in which pre-existing theory
11 frames the analysis of complex empirical issues. Theory is confronted with detailed historical
12 evidence to test its explanatory power and identify limitations. The value to organization
13 studies lies in *testing and refining existing theory*. Organizational ecology research (Hannan
14 & Freeman, 1977, 1984, 1989), for example, has spawned a large body of theory relating to
15 the dynamics of organizational populations, including founding, market entry and exit,
16 structural inertia, organizational mortality and longevity (Freeman, Carroll, & Hannan, 1983;
17 Barron, West, & Hannan, 1994; Ruef, 2004). In the strategy domain, Miller and Shamsie
18 (1996), whose work is grounded in the resource-based view of the firm, distinguish between
19 property-based and knowledge-based capabilities in their study of US film studios, finding
20 that the former matter most in periods of environmental certainty and the latter in times of
21 uncertainty. Liebowitz and Margolis (1995) probe the case of the VHS recording format,
22 once taken as an example of “lock-in” to an enduringly inferior outcome, to pinpoint
23 limitations in the alluring but imperfect logic underlying path dependence theory, refining
24 understanding by identifying three distinct forms of path dependence.
25
26
27
28
29
30
31
32
33
34
35
36
37
38
39
40
41
42

43 Historical organization studies of the *evaluative type*, wherein history is used to
44 interrogate and refine theory, help uncover the “dynamics of the phenomena” under scrutiny
45 while pointing to commonalities observed elsewhere (Dyer & Wilkins, 1991: 617). The
46 argument is regularly made that historical case studies are too specific for meaningful lessons
47 to be extracted from them; that in the search for generalizations, the role of history is
48 minimized. Yet history is not incompatible with generalized mechanisms. According to this
49 conception, history serves as laboratory or testing ground to confront theory with reality in an
50
51
52
53
54
55
56
57
58
59
60

1
2
3 incremental process of knowledge creation. Historical specificities matter, since differences
4
5 between industries and organizations can unsettle fixed conceptions (Eisenhardt, 1989). This
6
7 is reflected in the extensive overviews of organizational ecology research conducted by
8
9 Hannan and Freeman (1989) and Carroll and Hannan (2000). Re-evaluating judgments is
10
11 vital since researchers' views are located within "different regimes of evaluation", bearing
12
13 the stamp of the times in which they were formed (Leblebici, 2014: 74).
14
15

16 17 **History as Explicating**

18
19 Fundamental to explication is the development of an interpretive synthesis consistent
20
21 with both theory and the historical record. The value to organization studies lies in *applying*
22
23 *and developing theory to reveal the operation of transformative social processes*. North
24
25 (1990), for example, is keen to discover why nations experience ongoing disparities in
26
27 economic performance. He finds his answer in enduring differences in institutional
28
29 frameworks, some of which are more conducive to economic growth than others. In North's
30
31 world, the pivotal relationship in society is between institutions (which establish the rules of
32
33 the game) and organizations (teams that play by the rules). Institutional frameworks shape
34
35 interorganizational fields but institutional entrepreneurs may seek to change the rules to their
36
37 advantage, instigating new practices (Leblebici et al., 1991). Institutional theory owes much
38
39 of its appeal to its efficacy in explaining social phenomena in ways that question
40
41 conventional assumptions (Suddaby et al., 2014). This recognizes that the choices actors
42
43 make are constrained by prevailing societal rules and ideologies, accentuating the importance
44
45 of institutional path dependence and adaptation (Leblebici et al., 1991).
46
47
48

49
50 Fligstein's (1990) explication of the metamorphosis of corporate control in the US
51
52 from 1880 to 1990 focuses on the transition undergone by the country's largest industrial
53
54 companies. He locates the causes of relative decline in the "long-run strategic interaction"
55
56 that played out between firms and successive governments; observing that this derives from
57
58
59
60

1
2
3 the idea of the firm engendered by prevailing institutional frameworks. Boltanski and
4
5 Chiapello's (2007: 531) explication of contemporary capitalism is even more ambitious,
6
7 seeking to unveil its underlying mechanisms that fail to evoke meaningful critique. They aim
8
9 to reinsert this missing critique into "the interstices of everyday life" by taking a long view
10
11 that is "collective and historical from start to finish" (pp. 535, 532).

12
13
14 In historical organization studies of the *explicatory type*, comprehensive arguments
15
16 emerge from the interplay of theoretical ideas and historical evidence, leading to new
17
18 interpretations of past-to-present and theoretical refinements. The mode of enquiry is social
19
20 scientific, featuring fluent narration and sometimes long-run comparisons across space and
21
22 time (Piketty, 2014). Notions of (dis)continuity are deployed in empirical analyses to contrast
23
24 periods of incremental change with shorter bursts of rapid change, when time is compressed
25
26 and the forces of change transformative (Mizruchi, 2013). Numerous sources are drawn upon
27
28 to substantiate the ideas and propositions advanced in drawing far-reaching conclusions.
29
30

31 32 **History as Conceptualizing**

33
34 The value to organization studies of this type of research lies in *generating new*
35
36 *theoretical constructs*. David's (1985) paper on the longevity of the QWERTY keyboard is
37
38 foundational to the theory of path dependence, showing how temporally distant events can
39
40 have lasting impact (Sydow et al., 2009). The QWERTY layout, designed in 1867 to
41
42 overcome mechanical clashes, became "locked-in" despite better formats being available due
43
44 to "*technical interrelatedness, economies of scale and quasi-irreversibility of investment*"
45
46 (David, 1985: 334). Historical research in the strategy domain elicits the generation of
47
48 concepts. Tushman and O'Reilly's (1996) work on organizational ambidexterity, which
49
50 juxtaposes the challenges of *exploitation* and *exploration*, demonstrates the tendency for
51
52 firms to evolve strategies and practices in sync with environmental conditions, achieving
53
54 efficiency in exploitation, but with the risk of structural inertia impeding effectiveness in
55
56
57
58
59
60

1
2
3 exploration. Hence, only a “small minority of firms initiate discontinuous change before a
4 performance decline” (Tushman & O’Reilly, 1996: 28). One such firm is Intel, which has
5 refashioned itself twice since 1968, first from semiconductor memory manufacturer to
6 microprocessor specialist and latterly to Internet building block supplier. Burgelman (2002)
7 analyses these transitions within the framework of evolutionary theory, attributing Intel’s
8 success in reinvention to a complex of factors enabling it to embrace bold strategies, nurture
9 adaptive capabilities, and synchronize exploitation and exploration.
10
11
12
13
14
15
16
17

18 At the core of historical organization studies of the *conceptual type* is the desire to
19 draw lessons from history, generalizing inductively on the basis of specific cases. This may
20 be an “inexact process” but it is one that may nurture “richer and more robust...
21 conceptualization” (Wadhvani & Jones, 2014: 213). David’s (1985: 332) story caught the
22 imagination because it pointed to the importance of contingency in shaping persistent
23 solutions, as well as to “the dynamic process” itself taking on “an *essentially historical*
24 *character*”, engendering a new conceptual language and perspective on organizational
25 dynamics. Likewise, Tushman and O’Reilly (1996: 24-7) propose that ambidexterity results
26 from the combination of loose-tight structures accompanied by strong social controls,
27 encouraging diversity and a plurality of approaches within an enabling strategic framework.
28 Burgelman (2002) describes his research method as grounded theory (Glaser & Strauss,
29 1967), proceeding inductively from analysis of data gleaned from documents and interviews
30 with top executives. His research leads to a series of “insights” – part observational, part
31 conceptual – that extend evolutionary theory.
32
33
34
35
36
37
38
39
40
41
42
43
44
45
46
47
48

50 **History as Narrating**

51
52 The value to organization studies of this type of research lies in *explaining the form*
53 *and origins of significant contemporary phenomena*. Theory is largely offstage, propositions
54 and arguments emerging inductively from the accumulation, ordering and analysis of
55
56
57
58
59
60

1
2
3 historical evidence. This approach exhibits a high level of context sensitivity (Lippmann &
4 Aldrich, 2014). In Chandler's trilogy (1962, 1977, 1990), for example, a mass of case
5 evidence is deployed to explain the spread of innovations such as managerial hierarchies,
6 multidivisional structures and diversification. His text combines interpretive elements with
7 analytical moves to identify the causal factors that lead firms to displace markets in
8 coordinating economic activity and first movers to establish dominant positions. In *Exporting*
9 *the American Model* (1998), Djelic recounts how American policy-makers and their
10 European allies accelerated convergence on the American corporate system of economic
11 organization after World War II, promoted as a model for the West. Beyond the corporate
12 perspective, Tilly (2004) probes the history of social movements from the later eighteenth
13 century, defined as a distinct form of contentious politics. Effective action, he argues, derives
14 from a blend of campaigning, application of a repertoire of techniques, and the demonstration
15 of worthiness, unity, numbers and commitment.

16
17
18
19
20
21
22
23
24
25
26
27
28
29
30
31
32
33
34
35
36
37
38
39
40
41
42
43
44
45
46
47
48
49
50
51
52
53
54
55
56
57
58
59
60
Historical organization studies of the *narrative type* privileges historical storytelling
and argumentation over theorization, while yielding general propositions susceptible to
theoretical interrogation and empirical testing. There is increasing intellectual exchange
around the narrativization of organizational life, which is closely related to sensemaking
(Maclean, Harvey, & Chia, 2012; Rhodes & Brown, 2005; Weick, 1995); historical time
being an intrinsic aspect of the sensemaking process (Maclean, Harvey, Sillince, & Golant,
2014; Wadhvani & Jones, 2014). Generalizations and propositions flow inductively from
careful evaluation of evidence – primary sources, such as documents, diaries, letters and oral
histories, as well as secondary sources, including research monographs. Historiography, the
process of writing and making meaning from history, is for de Certeau (1988: 9, 10) “a
staging of the past” in which the past represents “the fiction of the present”. In this
dramatization, logic and theory are backstage, drawn upon to make sense of evidence and to

1
2
3 link one piece of evidence to another. Theoretical arguments infusing such historical
4 narratives remain largely unexpressed (Leblebici, 2014). Chandler deploys the logic of
5 internalization in *The Visible Hand* (1977) without explicitly mentioning the theory of
6 transaction costs (Bucheli, Mahoney, & Vaaler, 2010; Williamson, 1979). Djelic (1998)
7 draws implicitly upon path dependence theory to show how and why contexts and
8 specificities matter; the strength and interplay of isomorphic and path dependent forces
9 varying between countries. Likewise, history matters, Tilly (2004), suggests, because it
10 explains why social movements embrace distinctive forms of protest, highlighting the
11 contextual conditions that make movements possible (Davis, McAdam, Richard, Mayer, &
12 Zald, 2005; de Bakker, den Hond, King, & Weber, 2013).

23 24 25 **TOWARD A CREATIVE SYNTHESIS**

26
27 A creative synthesis is defined by Harvey (2014: 325) as “an integration of group
28 members’ perspectives into a shared understanding that is unique to the collective.” The four
29 conceptions of history explored above are expressions of “the historicity of organizational
30 life” (Zald, 1996: 256). The phenomena that organization theorists seek to explain are
31 historically constructed and imprinted (Stinchcombe, 1965). Theory, if it is to be truly
32 expressive of social reality, can only be developed, elaborated and tested against the type of
33 rich temporal data, quantitative and qualitative, found in history (Dyer & Wilkins, 1991).
34 This interplay is central to knowledge creation, since, returning to de Certeau’s (1988) notion
35 of the past as other, “the making of knowledge claims occurs in an awareness of...
36 involvement with others and otherness” (Holt & den Hond, 2013: 1587).

37
38 The ideal embraced by the notion of *dual integrity* is that historical organization
39 studies should be deemed authentic within the realms of both organization studies and
40 history. Within the eclectic mix of theory and subject matter that constitutes organization
41 studies we hold that the acid test of authenticity is *theory development*, making an explicit
42
43
44
45
46
47
48
49
50
51
52
53
54
55
56
57
58
59
60

1
2
3 contribution to advancing generalizable knowledge within the field (Delbridge & Fiss, 2013;
4
5 Suddaby et al., 2011). The pluralism of organization studies allows for variety in theory and
6
7 methods while remaining focused on organizations, organizing and organizational contexts
8
9 (Holt & den Hond, 2013). History, conversely, is near unbounded in subject matter (Braudel,
10
11 1980). Its defining characteristics relate to method and the derivation of meaning. The acid
12
13 test for authenticity is *historical veracity*, the quality of *ringing true* that stems from
14
15 faithfulness to available evidence, involving source analysis and evaluation to determine the
16
17 quality of evidence and its interpretive value (Bloch, 1953; Elton, 2002; Evans, 1997). Logic
18
19 and inductive reasoning are essential to interpretation, but should be consistent with the
20
21 evidence, acknowledging the interpretive weight placed upon it (Carr, 1990). Likewise, given
22
23 the subjective element of imagination inherent in interpretation, a key requirement is that
24
25 historians should declare their sources so that others may challenge inferences drawn from
26
27 them (Collingwood, 1993; White, 1987). Historians do not apply the test of replicability, but
28
29 in the name of historical veracity apply instead the test of openness with respect to evidence
30
31 and reasoning in the imaginary re-enactment of past experience (Elton, 2002).
32
33
34
35

36 The fundamental premise of this paper is that the *authenticity of theory development*
37
38 expected by organization studies and the *authenticity of historical veracity* required by
39
40 historical research place exceptional conceptual and empirical demands on researchers, in
41
42 part explaining the hitherto limited contribution of history to organization studies. Appraised
43
44 against the standards of *theory development* and *historical veracity*, the exemplars considered
45
46 in our discussion of Figure 1 largely satisfy both requirements, demonstrating how
47
48 engagement with history has enriched the field of organization studies. There are occasional
49
50 failures to establish historical veracity in the selected examples. Burgelman (2002), for
51
52 example, details his research methods but does not fully satisfy historical standards by
53
54 identifying his sources (interviewees and documents) and relating these to specific events.
55
56
57
58
59
60

1
2
3 However, we contend that what has been achieved already indicates the considerable
4 potential for growth in all four types of historical organization studies. For this to be realized,
5 the principles for a creative synthesis underpinning the practice of historical organization
6 studies require further elucidation. We next argue that *dual integrity, pluralistic*
7 *understanding, representational truth, context sensitivity* and *theoretical fluency* are
8 fundamental to historical organization studies, which should seek to resolve some of the
9 apparent dichotomies identified above by *embracing alterity*. Dismantling the forged
10 partitions between knowledge domains is to approach social life in its full, dynamic potential,
11 enhancing the capacity to see afresh and think anew (Braudel, 1980).
12
13
14
15
16
17
18
19
20
21
22

23 **Principles for a Creative Synthesis**

24
25 **Dual integrity.** We believe that fruitful collaboration depends on *dual integrity*. This
26 represents the *overarching principle* in the synthesis of organizational and historical
27 scholarship, from which the remaining four principles follow. We give dual integrity primacy
28 because it implies mutual respect and demonstrable competence in both disciplines,
29 according equal value to both while guaranteeing appropriate standards in each (see Table 1).
30 We regard dual integrity as critical to attracting scholarly legitimacy in a nascent field.
31
32
33
34
35
36
37

38
39 There are obvious dangers. Kieser (1994: 619) emphasizes that the exercise of
40 integrity in selecting and interpreting material is crucial to avoid mirroring “the ideologies of
41 the researcher”. White (1987: 164) warns of the risk of historical dilettantism, charging those
42 who venture into history to consider the values they bring to the process: “If you are going to
43 ‘go to history’, you had better have a clear idea of which history, and you had better have a
44 good notion as to whether it is hospitable to the values you carry into it.” Dual integrity
45 implies embedding a Janus-like perspective within the research design itself, drawing on the
46 past as a subjective, interpretive means of making sense of the present and future (Suddaby,
47 Foster, & Trank, 2010). Viewed in this light, neither discipline should direct the research
48
49
50
51
52
53
54
55
56
57
58
59
60

1
2
3 agenda at the expense of the other, connecting “abstract concepts in organization theory... to
4
5 case-specific historical knowledge without undermining the value of one or the other”. The
6
7 most celebrated social theories demand “both a historic turn and an appreciation of a
8
9 theoretical lens” (Leblebici, 2014: 79, 81). Dual integrity has implications for theory
10
11 building, creating the conditions for history to inform conceptual lenses in organizational
12
13 research as an integral part of theorization with the power to “stretch the scope of
14
15 explanations” (Lippmann & Aldrich, 2014: 128). For these reasons, we are not suggesting
16
17 that organization theorists merely borrow tools or methods from history, but are striving
18
19 instead for a meaningful synthesis in accord with the ideal of dual integrity.
20
21

22
23 **Pluralistic understanding.** Given the different conceptions of history explored
24
25 above, it is evident there is no one best way to achieve a creative synthesis. We agree with
26
27 Hall (1992: 189) that “it makes little sense to single out any one strategy as the ‘best’.” Dual
28
29 integrity requires a *pluralistic understanding* open to alternatives and different forms of
30
31 synthesis. This involves a relaxation of boundary assumptions that Steinmetz (2007a: 1)
32
33 likens to the arbitrary “political borders that European colonial powers drew onto the map of
34
35 Africa.” We do not advocate a collapse of opposites, “the instantaneous dissolving of what...
36
37 have been understood as profound antinomies” (Martin, 2003: 2). Rather, by drawing on the
38
39 strengths of both disciplines, we favour blending approaches to “seemingly dichotomous
40
41 concepts that are, in fact, mutually implicated” (Suddaby et al., 2011: 243). This draws on
42
43 Weber’s (1947) notion of *verstehen* informed by an empathetic tolerance of different methods
44
45 and practices, marrying historical explanation with an understanding of human agency; the
46
47 distanciation afforded by historical distance enhancing understanding of contemporary and
48
49 future-directed realities (Ricoeur, 1978). Such an approach acknowledges that “the
50
51 conceptual breadth of organization theory, its being ‘pluri-paradigmatique’, allows for ways
52
53 of comparative theorizing and analysing that few other ‘disciplines’ are able to match” (Holt
54
55
56
57
58
59
60

1
2
3 & den Hond, 2013: 1594). This implies a form of transdisciplinarity (Hall, 1992; Steinmetz,
4
5 2007b) that entails “a genuine willingness on both sides of the cultural divide to accept the
6
7 potential contributions of the other” (Leblebici, 2014: 80). Building on Holt and den Hond’s
8
9 (2013: 1594) notion of “stretching”, we advocate openness to diversity and alterity regarding
10
11 epoch and approach; developing greater porosity of boundaries to accommodate different
12
13 ways of doing history in organization studies.
14
15

16 **Representational truth.** A third principle stresses the importance of historically
17
18 informed organizational research *ringing representationally true*, exhibiting a high degree of
19
20 congruence between evidence, logic and interpretation. A “good story”, writes Zald (1993:
21
22 522), “must be true, and if the world is complex, a true story cannot just be weighted to one
23
24 side of the issue”. As Judt and Snyder (2013: 260) observe, “If it rings false, then it’s not
25
26 good history, even if it’s well written... on the basis of sound scholarship”. The thesis
27
28 propounded by Chandler (1962) that structural innovation is a function of strategic change
29
30 rings representationally true due to his faithfulness to detailed evidence and the logic
31
32 underpinning his interpretation, not because he aimed to satisfy the expectations of
33
34 organization theorists (Leblebici, 2014). The organizations Chandler explored can be re-
35
36 examined by management theorists through different cognitive lenses and, if appropriate,
37
38 recast in a contemporary light (Bucheli et al., 2010; Lippmann & Aldrich, 2014).
39
40
41
42

43 Organizational theory regularly adopts a decontextualized style in which
44
45 organizations appear uprooted from their socio-cultural environments. Abstracted
46
47 representation is intended to aid generalizability and prevent identification, such that
48
49 organizations are referred to anonymously as, say, “the Office” (Mantere, Schildt, & Sillince,
50
51 2012) – timeless, dislocated “abstracted entities” (Zald, 1996: 256). Yet such fictionalization,
52
53 while ensuring anonymity, impedes representational verisimilitude and verification (Clark &
54
55 Rowlinson, 2004; Godfrey & Hill, 1995). Too much abstraction removes from actors and
56
57
58
59
60

1
2
3 events the “untidiness” that Pettigrew (1985: 1) believes they should retain and reveal; a
4
5 sentiment we endorse on the grounds that “an accurate mess is far truer to life than elegant
6
7 untruths” (Judt & Snyder, 2013: 270). In the case of historical research, the need for
8
9 anonymity of firms and actors may be obviated, since the events in question occur at one
10
11 remove in the “other time” of the past (de Certeau, 1988). Disembedding organizations from
12
13 the local contexts within which they were formed deprives the reader of telling details,
14
15 preventing the narrative from *ringing true* to those who read it (Geertz, 1973). History and
16
17 real human social existence are inextricably related, social exchange being “historically
18
19 transacted” (Bryant & Hall, 2005: xxxi). Representational truth is required to convey this
20
21 interrelatedness.
22
23

24
25 **Context sensitivity.** Representational truth is part and parcel of what Judt and Snyder
26
27 (2013: 268) call “getting it right”, constructing a rounded picture to enhance understanding of
28
29 the issue in question. This underlines the importance of *context sensitivity*, attentiveness to
30
31 historical specificities, a fourth principle for a creative synthesis that is especially pronounced
32
33 in historical research of the explicatory and narrative types (Hassard, 2012).
34
35

36
37 Hall (1992: 181) contends that there are theoretical and methodological reasons for
38
39 prioritizing contextualized explanation. Organizations are not stand-alone entities but are
40
41 “shaped by the worlds they inhabit” (Lippman & Aldrich, 2014: 124). Attentiveness to
42
43 temporal and geographical settings unlocks a deeper understanding of the socio-cultural
44
45 embeddedness of organizations and institutions as the outcome of contingent historical
46
47 processes from which they have emerged (Suddaby et al., 2014). From this viewpoint,
48
49 context is not a “constant or passive variable” but exhibits instead a “strong presence”
50
51 (Suddaby, Elsbach, Greenwood, Meyer, & Zilber, 2010: 1238, 1237).
52
53

54
55 Lippmann and Aldrich (2014) draw on Morgan and Prasad’s (2009) investigation of
56
57 tax policies in France and the US to highlight the profound influence socio-historical contexts
58
59
60

1
2
3 exert on particular institutional arrangements. Wadhvani and Jones (2014: 194) likewise
4
5 identify context as key to the entrepreneurial process because opportunities can only be
6
7 seized “in time”. Hence, the “making present” of entrepreneurial opportunity depends on the
8
9 ongoing interplay between entrepreneur, place and the process of becoming, enveloped by the
10
11 “experiential flow of history” (Popp & Holt, 2013: 10). Notwithstanding the parsimony
12
13 principle, which cautions that too much detail may detract from the argument being made
14
15 (Mayer, Davis, & Schoorman, 1995), organizations are historically nested in specific
16
17 temporal, socio-political contexts and processes. Context sensitivity is required to elucidate
18
19 more fully their present significance in contemporary society (Geertz, 1973; Zald, 1993).
20
21

22
23 **Theoretical fluency.** The fifth principle of historical organization studies is
24
25 *theoretical fluency* (Hassard, 2012), signalling command of the appropriate conceptual
26
27 language. The approach followed by organization theorists of taking an existing theory as the
28
29 starting-point for their research, putting the “truth” to one side, is misplaced here (Leblebici,
30
31 2014). Organizations are rarely chosen as sites of historical empirical investigation for their
32
33 potential theoretical contribution so much as for the intrinsic interest of the organization or
34
35 subject under study (Rowlinson et al., 2014). Leblebici and Shah (2004) stress that to gain a
36
37 fuller understanding of organizations demands theorization together with an interpretation of
38
39 actors’ intentionalities, since: “Time is not a line, but a network of intentionalities” (Merleau-
40
41 Ponty, 1962: 417). Harvey, Press and Maclean (2011) provide a useful example of
42
43 explicating temporal-theoretical ideas in their examination of how tastes are formed and
44
45 reproduced across generations through their study of William Morris. Taste formation
46
47 emerges as a *dynamic* process. As this study shows, ideas from existing organizational theory
48
49 may be revised when confronted with historical data, leading to theoretical development
50
51 (Kieser, 1994). Such theoretically informed historical organizational research might
52
53
54
55
56 overcome the apparent dichotomy between exposition and interpretation outlined in Figure 1
57
58
59
60

1
2
3 by providing a more nuanced dialectic between explanation and understanding, each
4 implicated in the other. As Ricoeur (1978) explains, “Understanding precedes, accompanies,
5 closes, and thus *envelops* explanation. In return, explanation *develops* understanding
6 analytically”. This suggests that while theoretical fluency is particularly suited to history as
7 conceptualizing and evaluating, it also enhances conceptions of history whose primary
8 purpose is to explain. In this way, explicitly (in the case of explicating) or more implicitly
9 (narrating), “a theoretical narrative becomes an integral part of historical narrative discourse”
10 (Leblebici, 2014: 73).
11
12
13
14
15
16
17
18
19

20 The notion of “rhetorical history” advanced by Suddaby et al. (2010) is illustrative.
21 This draws on Hobsbawm’s (1983) concept of invented tradition to underline the interpretive
22 dimension of history, revealed as a combination of subjective and objective reality through
23 which the past may be persuasively re-interpreted. Rhetorical history addresses the theoretical
24 intersection between history and organization studies where the two become conjoined.
25 Wadhvani and Jones’s (2014) exploration of historical entrepreneurship also targets this
26 conceptual overlap, building temporal sequencing into an overarching theoretical perspective
27 designed to emphasize how entrepreneurs’ conception of their socio-historical situatedness
28 influences the types of opportunity they pursue. Both examples illustrate Kipping and
29 Üsdiken’s (2014: 576) notion of “historical cognizance”, characterizing studies that absorb
30 historical complexity as “an explicit part of theorizing itself, through the introduction of
31 period effects or the development of historically contingent theories.”
32
33
34
35
36
37
38
39
40
41
42
43
44
45
46

47 Table 1 brings together the four conceptions of history in organization studies and
48 integrates these with the five principles delineated above. This indicates the relative
49 importance – essential, important or useful – of each principle to each mode of historical
50 inquiry, and states succinctly the value of applying a particular principle in each type of
51 research. It suggests that some principles weigh more heavily in some instances than in
52
53
54
55
56
57
58
59
60

1
2
3 others. For example, the principle of theoretical fluency may be of relatively limited
4
5 importance to scholars like Chandler (1962) when writing business history narratives, but it is
6
7 intrinsically *important* to the other three modes of enquiry. Likewise, the conceptualizing
8
9 approach may call for a move away from representational truth in favor of abstraction, as
10
11 illustrated by Weber's (1947) effort to develop ideal types. History of the explicating type, as
12
13 exemplified by North (1990), arguably calls for a higher degree of representational truth due
14
15 to the specific "truth claims" that studies of historical institutionalism tend to advance
16
17 (Suddaby et al., 2014: 104). Dual integrity, the overarching principle from which the others
18
19 follow, is deemed *essential* to all types of historical organization studies.
20
21

22
23 -----
24 Insert Table 1 about here
25 -----
26

27 **Realizing a Creative Synthesis**

28
29 The five principles discussed above underpin our vision of historical organization
30
31 studies as an emerging field of academic enquiry. Each of the four quadrants within our
32
33 typology represents a lens through which a particular phenomenon might be examined, with
34
35 differing insights emerging in consequence. This can be illustrated by taking a single
36
37 example. For this historiographical exercise we have selected *institutional entrepreneurship*
38
39 as the theoretical domain (DiMaggio, 1988), acknowledging the growing interest in historical
40
41 institutionalism (Leblebici et al., 1991; Suddaby et al., 2014) and historical entrepreneurship
42
43 theory (Popp & Holt, 2013; Wadhvani and Jones, 2014), using Andrew Carnegie as our
44
45 historical subject.
46
47
48

49
50 Institutional theory, a prominent conceptual lens in organizational theory, holds that
51
52 organizations are susceptible to their socio-cultural milieux as well as to prevailing economic
53
54 conditions (Suddaby, 2010a). An institution comprises "more-or-less taken-for-granted
55
56 repetitive social behaviour that is underpinned by normative systems and cognitive
57
58
59
60

1
2
3 understandings that give meaning to social exchange and thus enable self-reproducing order”
4
5 (Greenwood, Oliver, Sahlin, & Suddaby, 2008: 4-5). Hence, institutions take the form of
6
7 systematized rules or norms of behaviour that lend significance to taken-for-granted social
8
9 arrangements that are relatively impervious to change (Suddaby & Greenwood, 2009).
10
11 Organizational institutionalism has evolved from an initial concern with subjective values,
12
13 attitudes, informal interaction and local communities, dubbed “old institutionalism”
14
15 (Selznick, 1949; 1957), to a preoccupation with legitimacy, embeddedness, routines and
16
17 scripts at field or societal level, labelled “new institutionalism” (DiMaggio & Powell, 1991:
18
19 13; Meyer & Rowan, 1977). “Neo-institutionalism”, which blends the two approaches,
20
21 focuses attention on organizational stability and change (Greenwood & Hinings, 1996).
22
23 However, while old institutionalism recognized the influence of agency in shaping social
24
25 arrangements, new institutionalism has tended to overlook individual efforts to mould
26
27 institutional rules, prompting calls to correct this imbalance by revising perceptions of
28
29 individuals as agents rather than onlookers (Lawrence, Suddaby, & Leca, 2011). Dynamic
30
31 players within the field orchestrate institutional change according to Leblebici et al. (1991).
32
33 Greenwood and Suddaby (2006) likewise stress the role played by elites as change agents in
34
35 institutional adaptation. The notion of “institutional entrepreneurship” that these views
36
37 convey underlines the key role of individual agents in reshaping institutional landscapes in
38
39 their favor. Institutional entrepreneurship therefore concerns “the activities of actors who
40
41 have an interest in particular institutional arrangements and who leverage resources to create
42
43 new institutions or to transform existing ones” (Maguire, Hardy, & Lawrence, 2004: 657).
44
45 Hence, institutional entrepreneurs are actors who envision and engender novel institutions to
46
47 suit their preferred interests (Greenwood & Suddaby, 2006).
48
49
50
51
52

53
54 The historical subject under review here is the steel magnate Andrew Carnegie (1835-
55
56 1919) operating within the field of philanthropy. Carnegie was heavily involved in institution
57
58
59
60

1
2
3 building (Nasaw, 2006). His pledge to distribute the bulk of his wealth during his lifetime
4
5 marks him out as a pioneer, reframing expectations for others to follow (Bishop & Green,
6
7 2008).
8

9
10 **Evaluating.** Under this conception of history, detailed historical evidence is deployed
11
12 in *testing and refining existing theory*. One element critical to institutional entrepreneurship,
13
14 and germane to Carnegie's case, concerns legitimacy and how it is acquired in a situation
15
16 where there is no pre-existing legitimacy on which to draw, as might apply in a nascent
17
18 industry or new institutional environment. Aldrich and Fiol (1994) argue that legitimacy is a
19
20 substantive issue in institutional entrepreneurship, its pursuit progressing from innovation to
21
22 wider socio-political contexts. Legitimacy is closely allied to reputation. Carnegie's standing
23
24 had been badly tarnished by his reputation for exploiting customers, acquaintances and
25
26 enemies alike (Hutner; 2006), and most emphatically by the 1892 Homestead strike when he
27
28 locked employees out of the steelworks and brought in the military. Through authorship of
29
30 *The Gospel of Wealth*, Carnegie (2000b) sought to reframe the compact between wealthy
31
32 industrialists and the wider community, enhancing the legitimacy of the former through an
33
34 agreement to give back to the latter. He reconfigured the meaning of wealth as something that
35
36 could be enjoyed provided it was given away during the lifetime of the holder. In this way,
37
38 Carnegie emerged as a "rule creator" (Garud, Jain, & Kumaraswamy, 2002: 208) who sought
39
40 to change the social norms pertaining to philanthropy to establish wider institutional
41
42 legitimacy for wealthy entrepreneurs.
43
44
45
46

47
48 In the interests of representational truth and pluralistic understanding, accurately
49
50 reflecting social reality matters. Greenwood and Suddaby (2006: 29) identify institutional
51
52 entrepreneurs as "interest-driven, aware, and calculative". In opposition to Boulding's (1962)
53
54 argument that philanthropy represents a gift driven by altruism without implied reciprocity,
55
56 inspecting philanthropic practice through the lens of institutional entrepreneurship theory
57
58
59
60

1
2
3 unsettles this perception, re-evaluating it as a legitimating strategy which allows
4
5 philanthropists to reap a potential profit of supposed disinterestedness (Aldrich & Fiol, 1994).
6

7 **Explicating.** Under this conception of history, *application and development of theory*
8
9 within history fosters a deeper, nuanced understanding of the operation of transformative
10
11 social processes, potentially leading to the development of new theoretical insights.
12

13
14 Acquiring an understanding of how institutional fields assume shape and form represents a
15
16 key stage in advancing institutional theory (Lawrence & Phillips, 2004). This requires two-
17
18 way interaction between theory and evidence, in keeping with our principles of dual integrity
19
20 and pluralistic understanding. History as explicating elucidates elements of institutional
21
22 entrepreneurship by accentuating context sensitivity and the institutional conditions in which
23
24 transformative processes occurred. This illuminates *inter alia* the “historically derived
25
26 perceptions” (North, 1990: 96) characterizing actors within the nascent philanthropic field.
27
28 Carnegie’s (2006a, 2006b) rags-to-riches narrative, which charts his career progression from
29
30 poor Scottish immigrant to world-maker, is couched within the parameters of the socially
31
32 constructed norms and assumptions of the day (North, 1990). Context sensitivity fosters
33
34 authenticity through the accumulation of contextual detail that rings true, validating
35
36 inferences drawn from the interplay of theory and data.
37
38
39

40 Carnegie’s writing and practice shed light on the paradox of embedded agency. He
41
42 emerged as an agent of institutional change within a nexus of taken-for-granted prescriptions
43
44 of accepted modes of social behavior (Seo & Creed, 2002), confirming that institutions are
45
46 not permanent but subject to “ongoing transformations by motivated actors” (Lawrence &
47
48 Phillips, 2004: 692). Carnegie was not the first wealthy industrialist to invest a large part of
49
50 his fortune charitably, but through his endeavours he reshaped the institution of philanthropy
51
52 itself, changing the orientations and practices of rich industrialists both in the US and further
53
54 afield. Viewed in this light, Carnegie emerges as an institutional entrepreneur first and
55
56
57
58
59
60

1
2
3 foremost and a philanthropist secondarily, his philanthropy serving as a platform to realize
4
5 desired outcomes in other domains, including international peace and arbitration, innovation
6
7 in philanthropy spawning innovation in wider socio-political fields (Aldrich & Fiol, 1994).
8

9
10 **Conceptualizing.** Under this conception of history, the objective is to *generate new*
11
12 *theoretical constructs* through systematic interrogation of historical data while encouraging
13
14 theoretical boldness in the spirit of pluralistic understanding. Framed this way, historical
15
16 analysis of institutional entrepreneurship promotes theoretical fluency by placing conceptual
17
18 emphasis on the multi-level role played by Carnegie in refashioning the emergent
19
20 philanthropic field (Garud et al., 2002). This accentuates the conjoined nature of
21
22 entrepreneurship and philanthropy within his world, with similar strategies in play, deploying
23
24 accumulated economic, cultural, social and symbolic capital to succeed in business and
25
26 philanthropic ventures (Bourdieu, 1986). In employing entrepreneurial and business skills
27
28 and contacts to further his philanthropic agenda, Carnegie may be seen to have pioneered
29
30 “entrepreneurial philanthropy”, defined, following Harvey, Maclean, Gordon and Shaw
31
32 (2011: 428), as the pursuit by entrepreneurs on a not-for-profit basis of social objectives
33
34 through active investment of their economic, cultural, social and symbolic resources.
35
36

37
38 Investment in philanthropic projects yielded positive returns for Carnegie in terms of
39
40 capital accumulation; revealing the various capitals he accrued as intrinsically interconnected.
41
42 It is important to recognize for the sake of representational truth that philanthropy increased
43
44 his stocks of social *and* symbolic capital, enabling him to convert surplus millions into higher
45
46 social standing and access to prized networks that he could exploit to expand his business
47
48 (Bourdieu, 1986). Institutional entrepreneurship could now be practised on a far wider stage,
49
50 enhancing his ability to realize preferred outcomes through the exercise of an increasingly
51
52 extensive policy-making role in society. What Bourdieu (1987) calls “world-making”, “the
53
54 embedded ways in which agents relate to and shape systems of meaning and mobilize
55
56
57
58
59
60

1
2
3 collective action to change social arrangements” (Creed, Scully, & Austin, 2002: 475),
4
5 became feasible. On a practical level, Carnegie’s example provided a role model for
6
7 prospective entrepreneurial philanthropists, such as Gates, to follow. On a conceptual level, it
8
9 illustrates how a theoretical construct like entrepreneurial philanthropy can be boldly and
10
11 creatively expanded to inform related concepts such as world-making.
12

13
14 **Narrating.** Under this conception of history, propositions and arguments emerge
15
16 inductively in *explanation of the form and origins of significant contemporary phenomena*.
17
18 Wadhvani and Jones (2014) note that entrepreneurship scholars have recently displayed
19
20 heightened interest in personal narrative accounts so as to illuminate the entrepreneurial
21
22 process (Popp & Holt, 2013). History of the narrative type is characterized by a high degree
23
24 of context sensitivity, emphasizing the formative influence of situated environment(s) in
25
26 which institutional adaptation plays out. Carnegie’s (2006b) account of how he accumulated
27
28 his fortune and gave most of it away, one of the first life stories to be published by a
29
30 businessman, is related chronologically and abounds with telling details.
31
32

33
34 Institutions, Munir and Phillips (2005) observe, are primarily constructed discursively
35
36 through texts rather than actions, suggesting that one of Carnegie’s main contributions to
37
38 modern philanthropy lay in *narrating his story*, making a powerful case for entrepreneurial
39
40 philanthropy that inspired others to act (Bishop & Green, 2008; Golant, Sillince, Harvey, &
41
42 Maclean, 2015). *The Gospel of Wealth* (2000b) proved game changing, shifting perceptions
43
44 of what it meant to be super-wealthy by insisting that possession of great wealth entailed
45
46 commensurate obligations to communities. Carnegie reconstructed the narrative identity – the
47
48 “story a person tells about his or her life” (Ezzy, 1998: 239) – of affluent entrepreneurs by re-
49
50 positioning them as trustees of wealth rather than possessors of large fortunes. He changed
51
52 the institution of philanthropy by altering “the conditions and contexts under which
53
54 subsequent cognitive and behavioural acts” would play out (Wadhvani & Jones, 2014: 203).
55
56
57
58
59
60

1
2
3 In instilling a new conception of charitable giving among a section of the wealthy, he
4
5 modified the prevailing script to their potential advantage by linking wealth directly with
6
7 moral legitimacy (Aldrich & Fiol, 1994). More discourse analysis of narratives told by
8
9 institutional entrepreneurs, past and present, might promote representational truth by
10
11 elucidating how they embed their own interests in the reconfigured field while ostensibly
12
13 transcending self-interest (Maclean, Harvey, Gordon, & Shaw, 2015; Munir & Phillips, 2005;
14
15 Suchman, 1995).
16
17

18 DISCUSSION

19
20 We argue that to realize the full potential of historical organization studies, we should
21
22 celebrate difference and value each of the four types we delineate, building on what has
23
24 already been achieved. At the same time, it is important to recognize that much remains to be
25
26 done before organization theorists fully embrace history. There are pioneers who have blazed
27
28 a trail, but the way forward is not yet fully charted. Many questions remain unanswered. For
29
30 example, how might historical organization studies deal with the static/dynamic dichotomy?
31
32 What kind of topics might it focus on? What kind of theorizing approach might be
33
34 appropriate to it? The list is far from exhaustive; nonetheless even provisional answers to
35
36 these questions might demonstrate how organizational theorists might incorporate history
37
38 more fully in their research, while articulating how organizational theory can extend the reach
39
40 of historical research in turn.
41
42
43
44

45 **Advancing Historical Organization Studies**

46
47 **Diachronic and synchronic contrasts.** A creative synthesis can involve synthesizing
48
49 paradoxes, real or apparent (Suddaby et al., 2011). William Blake's *Auguries of Innocence*
50
51 speaks of seeing "a world in a grain of sand, and heaven in a wild flower. Hold infinity in the
52
53 palm of your hand, and eternity in an hour." Organization studies, we suggest, would benefit
54
55 from varying its temporal perspectives in the spirit of Blake's verse to admit more diachronic
56
57
58
59
60

1
2
3 and synchronic contrasts (Giddens, 1979). The synoptic and dynamic are interrelated, a
4
5 synoptic image of a society being essential to gauge its diachronic evolution (Steinmetz,
6
7 2007a). Braudel (1980: 33, 27) sees value in the contrast between “explosions of historical
8
9 time” when set against the “semistillness” of “expanses of slow-moving history”, lengthening
10
11 timescales resulting in “a history capable of traversing even greater distances.” Braudel
12
13 (1995) illustrates this perspective through his study of the Mediterranean, the heterogeneous
14
15 histories of its peoples exhibiting unexpected unity. Likewise, Johnson (2007) explores the
16
17 origin and operation of the Paris Opera, revealing how conditions peculiar to its founding left
18
19 an enduring stamp on its development over centuries (Lippmann & Aldrich, 2014). Some
20
21 mutations are discernible only when examined in the fullness of time (Aldrich & Ruef, 2006;
22
23 Kieser, 1994, 1998; Ruef, 2012; Ruef & Fletcher, 2003; Ruef & Patterson, 2009). Change to
24
25 deep structures is often protracted, pointing to the role of history as revealing patterns and
26
27 sequences that determine long-term socio-economic arrangements (Wadhvani & Jones,
28
29 2014: 198). Extending timescales may be problematic when undertaking real-time
30
31 organizational research, but in historical organization studies the availability of the “other
32
33 time” of the past means this problem is more easily surmounted (de Certeau, 1988).

34
35
36
37
38 The case we make is not specifically for research over extensive time frames, but for a
39
40 more open “dialectic of duration” (Braudel, 1980: 26) that a closer *rapprochement* of history
41
42 and organization studies could offer. The past illuminates the present and the projected
43
44 future, and it is in the interplay between different time frames that the greatest potential for
45
46 enhancing understanding lies. The past should not be made to adhere to “static, dyad-like,
47
48 either/or, before/after formulations” (Judt, 1979: 77). Nor is history a seamless narrative.
49
50 Embracing a “multiplicity of time” to punctuate the “*longue durée*” of long-lasting
51
52 movements with shorter bursts of transformative change casts fresh light on contemporary
53
54 realities (Braudel, 1980: 27). There is a “sedimentation effect” in processes of socio-historical
55
56
57
58
59
60

1
2
3 change whereby the significance of an event may only become apparent much later, looking
4
5 back, discernible in underlying structures and practices (Clegg, 1981; Suddaby et al., 2014:
6
7 101). Contrasting timescales help to pinpoint “the unique effects of situational genesis and
8
9 context” (Hall, 1992: 181), potentially uncovering earlier origins of phenomena than
10
11 anticipated (Casson & Casson, 2013).

12
13
14 Examining change in retrospect throws into relief commonalities and differences
15
16 between timeframes so that the general may emerge from the particular (Lippmann &
17
18 Aldrich, 2014). Theorization concerns the articulation of common structures and associations,
19
20 fostering shared perspectives that yield original ideas (Steinmetz, 2007a). For historians,
21
22 viewing phenomena through the cognitive lens of an organizational theory can enhance
23
24 understanding because the reframing of an issue can cast it in a new light, and because
25
26 theory, being used to predict, is oriented towards the unfolding future (Popp & Holt, 2013).
27
28 This may extend temporal horizons from the past into the present and future, as “patterned
29
30 ways of making sense of the world” pointing to what might lay ahead (Hall, 1992: 171).

31
32
33 **Managerialism and social movement research.** Power is the pivotal notion in the
34
35 study of human society (Clegg, 1989; Haugaard & Clegg, 2009; Judt, 1979), integral to the
36
37 study of capitalism and its managerial elites (Maclean, Harvey, & Chia, 2010; Maclean,
38
39 Harvey, & Press, 2006). History likewise has accorded undue attention to political power
40
41 brokers and captains of industry relative to the lives of ordinary people (Collingwood, 1993;
42
43 Sewell, 2005). Organizational history has centred on management, to whom the majority of
44
45 documents in corporate archives relate (Delayhaye et al., 2009). While labour process
46
47 theorists have addressed this issue (Knights & Willmott, 1990), the imbalance remains. The
48
49 new configurations of power currently obtaining have generated increasing levels of
50
51 inequality largely hidden from view, but susceptible to revelation through historical analysis
52
53 (Piketty, 2014).
54
55
56
57
58
59
60

1
2
3 Research on social movements and civil society in which history and organization
4 studies are conjoined might help rectify the imbalance between elite and people's histories.
5
6 Lippmann and Aldrich (2014: 138) argue that social movements serve as "selection forces for
7 organizations"; how firms respond to them often determining their chances of survival.
8
9 Courpasson (2013: 1244) has disclosed that when he proposed a special issue of
10 *Organization Studies* on social movements, the objection was raised that this "would not
11 belong to organizational research per se." The notion that social movements might fall
12 outside the province of organization studies is revealing, implying there are some topics
13 deemed to fit within the disciplinary boundaries of organizational research and others that do
14 not. However, social movement research arguably exemplifies the type of subject to which
15 historical organization studies might contribute; engendering new sources of institutional
16 logics while presenting an opportunity to learn from past struggles in specific contexts
17 (Dacin, Goodstein, & Scott, 2002). Grass-roots action provides countervailing resistance to
18 the oppressive force of capitalist and political elites in past and present times, creating the
19 conditions for theoretical integration between empirical and disciplinary domains (de Bakker
20 et al., 2013; Tilly, 2004). All social movements are different, bound up with the specific geo-
21 political contexts that spawned them, while displaying commonalities enabling
22 generalizations to be drawn (Dyer & Wilkins, 1991). The French Revolution, for example,
23 observed through the lens of social movement research, emerges as a "turning-point in the
24 cultural history of the modern world-system" (Wallerstein, 2004: 60), shifting the boundaries
25 between the included and excluded.

26
27
28 **Meta-narratives and micro-history.** Historical organization studies reside in the
29 interaction between meta-narrative and micro-history (Magnússon, 2006). We define micro-
30 history as the history of the unique event or circumscribed community. Its "close optic"
31 (Putnam, 2006: 626) provides an antidote to hegemonic meta-narratives: grand narratives or
32
33
34
35
36
37
38
39
40
41
42
43
44
45
46
47
48
49
50
51
52
53
54
55
56
57
58
59
60

1
2
3 major storylines that unfold over time and amplify “the voices of the articulate elite whose
4 documentation is so abundant” (Brown, 2003: 7). Micro-history recognizes the importance of
5
6 the daily encounters that sustain a social reality and the power relations these engender,
7
8 eschewing the “biggest and most successful exemplars” that typically attract academic
9
10 attention (Lippmann & Aldrich, 2014: 140). Ulrich’s (1991) study of midwifery, for example,
11
12 is extrapolated from one midwife’s diary. In re-directing attention towards the life-worlds of
13
14 ordinary individuals, micro-history offers a context-rich alternative to research overly fixated
15
16 on large-scale endeavours.
17
18
19

20
21 Popp and Holt (2013) provide a useful illustration of micro-history that makes sense
22
23 of unfolding entrepreneurial opportunity by examining letters penned by the founders of a
24
25 merchant house in Calcutta in 1834. Recourse to personal letters provides a window on the
26
27 day-to-day minutiae of entrepreneurial lived experience. The authors challenge the dominant
28
29 theorization of entrepreneurial opportunity (Shane & Venkataraman, 2000), which
30
31 emphasizes outcomes at the expense of the social micro-processes that produced them
32
33 (Lippmann & Aldrich, 2014). Their study comprises a future-oriented historical narrative that
34
35 conforms to the narrative and conceptual types discussed above. Thought-provoking
36
37 historical accounts that challenge orthodox theories encourage organizational researchers to
38
39 cast their nets more widely in terms of their sources, methods, and theoretical perspectives.
40
41
42

43
44 Meta-narratives formed by the dominant themes of late modernity include the rise of
45
46 individualism, which has suppressed longstanding notions of collectivity (Boltanski &
47
48 Chiapello, 2007; Fligstein, 1990). Such universalising rhetorics drown out subjective grass-
49
50 roots stories told by those denied access to the levers of power (Brown, 2003). Life stories
51
52 related by individuals located outside the customary frame of research – who represent “the
53
54 other” in de Certeau’s (1988) terms – convey personal experience while highlighting
55
56 generalities. Micro-history stays close to reality, providing a means of accessing collective
57
58
59
60

1
2
3 memories through personal testimony. Real people emerge through such stories with
4 identities and opinions of their own (Magnússon, 2006). Viewed in this light, a micro-
5 historical approach may reinvigorate organizational research by uncovering fresh, pluralistic
6 insights through a “bottom up” perspective, challenging macro-level views by invoking the
7 (extra)ordinary vitality of human agency (Roy, 2000).
8
9

10
11
12
13
14 Organizational theory may enhance the interaction between meta-narrative and micro-
15 history, offering historians an array of conceptual lenses to inform their work (Leblebici,
16 2014). Examining a historical event through the cognitive lens of a relevant organizational
17 theory – such as the founding of the Paris Opera seen through the lens of imprinting
18 (Johnson, 2007), or shifting attitudes to whale-watching from an institutional perspective
19 (Lawrence & Phillips, 2004) – frames that phenomenon so as to promote shared approaches,
20 “making other types of understanding more explicit” (Leblebici, 2014: 76). Making sense of
21 the past through different theoretical frameworks highlights connections between seemingly
22 disparate events. These may play out on stages of varying dimensions according to different
23 timescales. However, highlighting the general in the particular allows both to be seen in
24 combination, affording new comparative perspectives (Wadhvani & Jones, 2014).
25
26
27
28
29
30
31
32
33
34
35
36
37

38 **Mapping the Future**

39
40 A creative synthesis entails a more meaningful engagement with “the other”, bringing
41 together two different “heterologies” or “discourses on the other” to foster mutual
42 understanding (de Certeau, 1988: 3; Sewell, 2005). The future of organization studies as a
43 discipline requires continuing intellectual boldness (Holt & den Hond, 2013). Bridge building
44 demands a greater porosity of boundaries that challenges the orthodoxy of dominant
45 paradigms (Steinmetz, 2007a). Guided by this perspective, our first main contribution to the
46 literature is to have elaborated and refined the idea of *historical organization studies*. This
47 concerns organizational research that draws extensively on historical data, methods and
48
49
50
51
52
53
54
55
56
57
58
59
60

1
2
3 knowledge to marry together historical narrative with organizational explanation. The writing
4
5 of history is imbricated with the doing of organization studies to generate historically
6
7 informed theoretical narratives characterized by *dual integrity*, building on the strength and
8
9 diversity of both disciplines.
10

11 We have drawn on existing research from organization studies (Kieser, 1994;
12
13 Rowlinson & Clark, 2004; Üsdiken & Kieser, 2004; Zald, 1993), history (Braudel, 1980;
14
15 Collingwood, 1993; Judt & Snyder, 2013; White, 1987) and recent research which addresses
16
17 the conceptual overlap between the two (Bucheli & Wadhvani, 2014; Kipping & Üsdiken,
18
19 2014; Leblebici, 2014; Lippmann & Aldrich, 2014; Rowlinson et al., 2014; Suddaby et al.,
20
21 2014; Wadhvani & Jones, 2014) to establish that *theory development* and *historical veracity*
22
23 are dual requirements for successful research in historical organization studies, key to the
24
25 realization of a creative synthesis. Historical veracity demands that researchers attend to
26
27 organizational failures, often omitted from official documentation, as well as to what
28
29 organizations choose to forget, fostering a rounded understanding (Booth et al., 2007;
30
31 Lamoreaux, Raff, & Temin, 2007). This encourages researchers to appreciate that
32
33 generalizations pertaining to social realities are bounded by specific times and contexts
34
35 (O’Sullivan & Graham, 2010). How authenticity is constructed is important, with
36
37 implications for legitimation, which requires “a *relationship* with an audience” (Suchman,
38
39 1995: 594). A creative synthesis is bound up with legitimacy-seeking since its emergence
40
41 depends on the development of shared understanding amongst research communities
42
43 (Harvey, 2014). Moving forward collectively hinges on the articulation of recognized
44
45 constructs on which scholars can agree (Suddaby, 2010b). Our core insight is to suggest that
46
47 historically informed theoretical narratives mindful of both disciplines, whose authenticity
48
49 stems from *both theory development and historical veracity*, make a singular claim to
50
51 scholarly legitimacy. Legitimation through dual integrity will help research that falls within
52
53
54
55
56
57
58
59
60

1
2
3 the ambit of historical organization studies to reach a more general audience, showing that
4
5 the dualism between narrative and scientific approaches can be respected yet integrated,
6
7 informing one another, demonstrating how historical methods, data, and theoretical and
8
9 substantive insights can add value to the social scientific mainstream.
10

11 Our second main contribution is to develop and exemplify a conceptually robust
12
13 foundational model for historical organization studies. Figure 1 elaborates a typology of four
14
15 distinct conceptions of history in organization studies, informing strategies for future
16
17 research. The value of history conceived as *evaluating*, wherein theory is confronted with
18
19 historical data, lies in *testing and refining existing theory*. Organizational ecology and the
20
21 resource-based view of the firm are illustrative of theoretical domains ripe for a fuller
22
23 engagement with historical organization studies of this genre (Hannan & Freeman, 1977,
24
25 1984, 1989; Miller & Shamsie, 1996). The value of history conceived as *explicating*, wherein
26
27 synthetic narratives emerge from the interplay of theory and evidence, lies in *applying and*
28
29 *developing theory to reveal the operation of transformative social processes*. Institutional
30
31 theory (Selznick, 1949, 1996), predicated upon “a central but unarticulated assumption of
32
33 historical methods and theory”, illustrates the potential for this type of research (Suddaby et
34
35 al., 2014: 101). The value of history conceived as *conceptualizing*, wherein historical analysis
36
37 stimulates new ways of seeing, resides in *generating new theoretical constructs*. The origin
38
39 of path dependence theory is illustrative (David, 1985; Sydow et al., 2009). The value of
40
41 history conceived as *narrating*, wherein observed patterns and recurrences form the basis of
42
43 detailed analysis, lies in *explaining the form and origins of significant contemporary*
44
45 *phenomena*, being a source of context-sensitive interpretations and arguments. Cognitive
46
47 lenses that draw on the narrative turn, especially the sensemaking perspective, might enhance
48
49 research of this genre (Fenton & Langley, 2011; Weick, 1995). It is arguably the narrative
50
51 mode of historical enquiry that has gained most traction in organization studies in recent
52
53
54
55
56
57
58
59
60

1
2
3 years (Brown & Humphreys, 2002; Hansen, 2012; Rowlinson & Clark; Rowlinson et al.,
4
5 2010), reflecting the growing recognition that narratives open a valuable window onto the
6
7 organizational world (Gabriel, 2000). Overall, the value of our typology lies in demonstrating
8
9 the research potentialities of historical organization studies, which we have exemplified by
10
11 examining the career of Andrew Carnegie as institutional entrepreneur and philanthropist
12
13 through our four conceptual lenses in turn.
14
15

16
17 Our third main contribution is to elaborate five principles underpinning historical
18
19 organization studies: dual integrity, pluralistic understanding, representational truth, context
20
21 sensitivity and theoretical fluency, encapsulated in Table 1. We fashion a creative synthesis,
22
23 especially through our overarching principle of *dual integrity*, which emerges from and
24
25 inhabits the theoretical overlap between two equally valued disciplines. Dual integrity
26
27 demands that organizational researchers pay due regard to historical veracity in the search,
28
29 selection and evaluation of data whilst cultivating a nuanced capacity theoretically to appraise
30
31 the logics of institutions, cultures and human interaction (Greenwood & Bernardi, 2014). The
32
33 practical balance struck between theoretical and empirical concerns will naturally vary by
34
35 type of study. We argue that historical organization studies should eschew prescribing a new
36
37 blueprint in favour of “stretching” to embrace alterity in terms of subject matter, approach
38
39 and periodization; there being more than one way to understand the past (Holt & den Hond,
40
41 2013: 1594; Kieser, 1994).
42
43
44

45
46 We contend that history and organization studies, as humanistic endeavours
47
48 inextricably linked through an enduring concern for the human condition, offer, when
49
50 synthesized, enhanced potential to transform our understanding of contemporary and future-
51
52 directed organizational realities (Zald, 1993). We do not advocate a collapse of opposites but
53
54 argue instead for informed collaboration between seemingly divergent concepts that emerge
55
56 as “mutually implicated” (Suddaby et al., 2011: 243). Together, our three contributions
57
58
59
60

1
2
3 demonstrate that history affords a singular opportunity to cultivate an in-depth understanding
4
5 of the contextualized, sedimentary processes whereby organizations emerge, grow, flourish
6
7 and ultimately decline; the past informing the present and future.
8

9 10 **Conclusion**

11
12 At the outset of this paper, we asked how the enterprise of organization studies might
13
14 be enriched through greater, more meaningful engagement with history, historical sources
15
16 and historical methods. In response we suggest that, on a conceptual level, through
17
18 engagement with primary materials and critical reading of established narratives, history
19
20 stimulates thinking on vital organizational and institutional phenomena that might otherwise
21
22 go underappreciated, engendering new theoretical ideas, propositions and arguments. The
23
24 past can revivify future organizational research by extending historical approaches to areas
25
26 such as entrepreneurship (Wadhvani & Jones, 2014; Popp & Holt, 2013), institutional
27
28 entrepreneurship (Lawrence & Phillips, 2004; Munir & Phillips, 2005) and institutionalism
29
30 (Leblebici et al., 1991; Suddaby et al., 2014). Taking a long-run perspective rebalances
31
32 consideration of organizational origins and development *vis-à-vis* outcomes and end results
33
34 (Casson & Casson, 2013), so that the academic endeavour itself becomes “an origin, rather
35
36 than an end” (Popp & Holt, 2013: 25). On an empirical level, history affords access to a
37
38 wealth of multi-level quantitative and qualitative data related to organizations and organizing
39
40 that might be deployed in testing, refining and developing theoretical ideas. On a
41
42 methodological level, historical methods, designed to allow inferences to be drawn from
43
44 complex, incomplete data, have great potential for application in organizational research.
45
46
47
48

49
50 Historians also stand to benefit from greater engagement with organization theory.
51
52 Viewing an event through a particular cognitive lens can engender new conversations.
53
54 Reframing a phenomenon can reveal fresh insights to challenge existing thinking,
55
56 illuminating the historical landscape. Temporal-theoretical perspectives deriving from one
57
58
59
60

1
2
3 period may be transferable to other research settings. Adoption of a conceptual lens drawn
4
5 from organization theory can highlight new comparative perspectives that might otherwise go
6
7 unnoticed, accentuating links with similar studies to elucidate the “bigger picture” (Lippmann
8
9 & Aldrich, 2014). Elucidating the bigger picture may extend timeframes, affording access to
10
11 liminal spaces between past, present and future, which are interrelated: “The present *is* the
12
13 future of the past; it is thus both future and past in a synthesis that is actual” (Collingwood,
14
15 1993: 405).

16
17
18 The purpose of producing a typology or roadmap is to help researchers find their way
19
20 in the future. Mapping the territory is valuable, since new concepts often develop on the
21
22 perimeter of a field through the juxtaposition of antinomous perspectives (Greenwood &
23
24 Suddaby, 2006). Boundary bridging allows new vistas to emerge, revealing contradictory yet
25
26 overlapping logics. In nurturing *historically informed theoretical narratives*, organization
27
28 studies imbued with varying conceptions of history can synthesize ideas and advances into
29
30 impactful new theories. These may serve as guideposts to the future, pushing onward by re-
31
32 mapping the past (Gaddis, 2002; O’Sullivan & Graham, 2010), exploring what did not
33
34 transpire as well as what did (Lippmann & Aldrich, 2014). At a time when the field of
35
36 organization studies is concerned about a “future where theory is of less importance”
37
38 (Devers, Misangyi, & Gamache, 2014: 248), the uses of the past in organizing and
39
40 organizations provide fecund territory of contemporary relevance for future theorization.
41
42
43 Field theory provides a potential locus where historically oriented organization studies might
44
45 take place (Bourdieu, 1969; Fligstein & McAdam, 2012). Pushing the boundaries of existing
46
47 fields implies their redrawing to admit unorthodoxy, introducing the possibility of theorizing
48
49 more directly about intersections between fields (Fligstein, 2001). Such intersections may
50
51 spark ideas for the assimilation of history with synchronic explication, since “the only way to
52
53
54
55
56
57
58
59
60

1
2
3 reach conditions that we cognize and wish for is to make use of those conditions that we have
4
5 not wished for” (Martin, 2003: 44).
6

7
8 We posed a second question concerning the form(s) a creative synthesis of historical
9
10 organizational studies might assume. In exploring practical possibilities for this, we
11
12 illustrated our idea of historical organization studies with examples drawn from social
13
14 movement research and micro-history. These provide alternative perspectives to the
15
16 longstanding emphasis in organization studies on managerialism and for-profit organizations,
17
18 offering a bottom-up, pluralistic antidote to hegemonic meta-narratives. Change to a
19
20 scholarly field more likely originates from the periphery where disciplinary boundaries are
21
22 stretched (Leblebici et al., 1991). The value of micro-history lies in its focus on what history
23
24 has “forgotten” and deems to be irrelevant. Yet what the past ignores has a habit of coming
25
26 back to haunt it, as Fogel and Engerman (1974) demonstrated with regard to what the world
27
28 knew, or thought it knew, about slavery. This undermines any notion that the past is fixed and
29
30 unchanging, eschewing closure while remaining permanently open to revision. The
31
32 theoretical possibilities that uses of the past may stimulate within the field of organization
33
34 studies are potentially substantial. For as de Certeau (1988: 4) insists, “whatever this new
35
36 understanding of the past holds to be irrelevant – shards created by the selection of materials,
37
38 remainders left aside by an explication – comes back, despite everything, on the edges of
39
40 discourse or in its rifts and crannies”.
41
42
43
44
45
46
47
48
49
50
51
52
53
54
55
56
57
58
59
60

REFERENCES

- 1
2
3
4
5 Aldrich, H. E., & Fiol, C. M. 1994. Fools rush in? The institutional context of industry
6
7 creation. *Academy of Management Review*, 19(4): 645-670.
8
9
10 Aldrich, H. E., & Ruef, M. 2006. *Organizations evolving*. (2nd ed.) London: Sage.
11
12 Aron, R. 1959. Evidence and inference in history. In D. Lerner (Ed.), *Evidence and*
13
14 *inference: The Hayden colloquium on scientific concept and method*: 19-47.
15
16 Glencoe, IL: Free Press of Glencoe.
17
18 Arthur, W. B. 1989. Competing technologies, increasing returns, and lock-in by historical
19
20 events. *Economic Journal*, 99(394): 116-131.
21
22
23 Barron, D. N., West, E., & Hannan, M. T. 1994. A time to grow and a time to die: Growth
24
25 and mortality of credit unions in New York City. *American Sociological Review*,
26
27 100(2): 381-421.
28
29
30 Bishop, M., & Green, M. 2008. *Philanthrocapitalism*. London: Black.
31
32 Bloch, M. 1953. *The historian's craft*. New York: Alfred Knopf.
33
34 Boltanski, L., & Chiapello, E. 2007. *The new spirit of capitalism* (G. Elliott, Trans). London:
35
36 Verso.
37
38 Booth, C., Clark, P., Delahaye, A., Procter, S., & Rowlinson, M. 2007. Accounting for the
39
40 dark side of corporate history: Organizational culture perspectives and the
41
42 Bertelsmann case. *Critical Perspectives on Accounting*, 18(6): 625-644.
43
44
45 Booth, C., & Rowlinson, M. 2006. Management and organizational history: Prospects.
46
47 *Management and Organizational History*, 1(1): 5-30.
48
49 Boulding, K. E. 1962. Notes on philanthropy. In F. G. Dickinson (Ed.), *Philanthropy and*
50
51 *public policy*: 57-72. New York: UMI.
52
53
54 Bourdieu, P. 1969. Intellectual field and creative project. *Social Science Information*, 8(2):
55
56 89-119.
57
58
59
60

- 1
2
3 Bourdieu, P. 1986. The forms of capital. In J. G. Richardson (Ed.), *Handbook of theory and*
4
5 *research for the sociology of education*: 241-258. New York: Greenwood.
6
7 Bourdieu, P. 1987. *Choses dites*. Paris: Minuit.
8
9 Braudel, F. 1980. *On history*. Chicago: University of Chicago Press.
10
11 Braudel, F. 1995. *The Mediterranean and the Mediterranean world in the age of Philip II*
12
13 (S. Reynolds, Trans). (2nd ed.) Berkeley, CA: University of California Press.
14
15 Brown, A. D., & Humphreys, M. 2002. Nostalgia and the narrativization of identity: A
16
17 Turkish case study. *British Journal of Management*, 13(2): 141-159.
18
19 Brown, R. D. 2003. Microhistory and the post-modern challenge. *Journal of the Early*
20
21 *Republic*, 23(1): 1-20.
22
23 Bryant, J. M., & Hall, J. A. 2005. Towards integration and unity in the human sciences: The
24
25 project of historical sociology. In J. A. Hall & J. M. Bryant (Eds.), *Historical*
26
27 *methods in the social sciences: Volume 1*: xxi-xxxv. London: Sage.
28
29 Bucheli, M., Mahoney, J. T., & Vaaler, P. M. 2010. Chandler's living history: *The Visible*
30
31 *Hand* of vertical integration in nineteenth century America viewed under a twenty-
32
33 first century transaction cost lens. *Journal of Management Studies*, 47(5): 859-883.
34
35 Bucheli, M., & Wadhvani, R. D. (Eds.). 2014. *Organizations in time: History, theory,*
36
37 *methods*. Oxford: OUP.
38
39 Burgelman, R. A. 2002. *Strategy is destiny: How strategy-making shapes a company's*
40
41 *future*. New York: Free Press.
42
43 Carnegie, A. 2006a [1920]. *The autobiography of Andrew Carnegie*. New York: Signet
44
45 Classics.
46
47 Carnegie, A. 2006b [1889-1906]. *The gospel of wealth essays and other writings*. In D.
48
49 Nasaw (Ed.). *Andrew Carnegie*: 1-109. New York: Penguin.
50
51 Carr, E. H. 1990. *What is history?* (2nd ed.). London: Penguin Books.
52
53
54
55
56
57
58
59
60

- 1
2
3 Carroll, G. R., & Hannan, M. T. 2000. *The demography of corporations and industries*.
4
5 Princeton, NJ: Princeton University Press.
6
7 Casson, M., & Casson, C. 2013. *The entrepreneur in history: From medieval merchant to*
8
9 *modern business leader*. Basingstoke: Palgrave.
10
11
12 Chandler, A. D. J. 1962. *Strategy and structure: Chapters in the history of the American*
13
14 *industrial enterprise*. Cambridge: MIT Press.
15
16 Chandler, A. D. J. 1977. *The visible hand: The managerial revolution in American*
17
18 *business*. Cambridge, MA: Belknap/Harvard University Press.
19
20
21 Chandler, A. D. J. 1990. *Scale and scope: The dynamics of industrial capitalism*.
22
23 Cambridge, MA: Harvard University Press.
24
25 Clark, P., & Rowlinson, M. 2004. The treatment of history in organisation studies: Towards
26
27 an ‘historic turn’? *Business History*, 46(3): 331-352.
28
29
30 Clegg, S. R. 1981. Organization and control. *Administrative Science Quarterly*, 26: 545-562.
31
32 Clegg, S. R. 1989. *Frameworks of power*. London: Sage.
33
34 Clegg, S. R., & Bailey, J. R. 2008. *International encyclopedia of organization studies*.
35
36 London: Sage.
37
38 Collingwood, R. G. 1993. *The idea of history*. Oxford: Oxford University Press.
39
40
41 Cooper, D. J., Hinings, C. R., Greenwood, R., & Brown, J. 1996. Sedimentation and
42
43 transformation in organizational change: The case of a Canadian law firm.
44
45 *Organization Studies*, 17(4): 623-647.
46
47
48 Courpasson, D. 2013. On the erosion of “passionate scholarship”. *Organization Studies*,
49
50 34(9): 1243-1249.
51
52
53 Creed, W. E. D., Scully, M. A. & Austin, J. R. 2002. Clothes make the person? The tailoring
54
55 of legitimating accounts and the social construction of identity. *Organization Science*,
56
57 13(5): 475-496.
58
59
60

- 1
2
3 Dacin, M. T., Goodstein, J., & Scott, W. R. 2002. Institutional theory and institutional
4
5 change: An introduction to the special research forum. *Academy of Management*
6
7 *Journal*, 45(1): 45-57.
8
9
10 David, P. A. 1985. Clio and the economics of QWERTY. *American Economic Review*,
11
12 75(2): 332-337.
13
14 Davis, G. F., McAdam, D., Richard, W., Mayer, S., & Zald, N. (Eds.). 2005. *Social*
15
16 *movements and organization theory*. Cambridge: CUP.
17
18 De Bakker, F. G. A., den Hond, F., King, B., & Weber, K. 2013. Social movements, civil
19
20 society and corporations: Taking stock and looking ahead. *Organization Studies*,
21
22 34(5-6): 573-593.
23
24
25 De Certeau, M. 1988. *The writing of history*. New York: Columbia University Press.
26
27 Decker, S. 2013. The silence of the archives; Business history, post-colonialism and archival
28
29 ethnography. *Management & Organizational History*, 8(2): 155-173.
30
31
32 Delbridge, R., & Fiss, P. C. 2013. Styles of theorizing and the social organization of
33
34 knowledge. *Academy of Management Review*, 38(3): 325-331.
35
36 Devers, C. E., Misangyi, V. F., & Gamache, D. L. 2014. Editors' comment: On the future of
37
38 publishing management theory. *Academy of Management Review*, 39(3): 245-249.
39
40 DiMaggio, P. J. 1988. Interest and agency in institutional theory. In L. G. Zucker (Ed.),
41
42 *Institutional patterns and organizations: Culture and environment*: 3-22.
43
44 Cambridge, MA: Ballinger.
45
46
47 Djelic, M.-L. 1998. *Exporting the American model: The postwar transformation of*
48
49 *European business*. Oxford: OUP.
50
51
52 Dyer, A. G., & Wilkins, A. L. 1991. Better stories, not better constructs, to generate better
53
54 theory: A rejoinder to Eisenhardt. *Academy of Management Review*, 16(3): 613-619.
55
56
57
58
59
60

- 1
2
3 Eisenhardt, K. M. 1989. Building theories from case study research. *Academy of*
4
5 *Management Review*, 14(4): 532-550.
6
7
8 Elton, G. R. 2002. *The practice of history*. Oxford: Blackwell.
9
10 Evans, R. J. 1997. *In defence of history*. London: Granta.
11
12 Ezzy, D. 1998. Theorizing narrative identity: Symbolic interactionism and hermeneutics. *The*
13
14 *Sociological Quarterly*, 39(2): 239-252.
15
16 Fenton, C., & Langley, A. 2011. Strategy as practice and the narrative turn. *Organization*
17
18 *Studies*, 32(9): 1171-1196.
19
20 Ferguson, N. 1997. Virtual history: Towards a “chaotic” theory of the past. In N. Ferguson
21
22 (Ed.), *Virtual history: Alternatives and counterfactuals*: 1-90. London: Penguin.
23
24 Fligstein, N. 1990. *The transformation of corporate control*. Cambridge, MA: Harvard
25
26 University Press.
27
28 Fligstein, N. 2001. Social skill and the theory of fields. *Sociological Theory*, 19(2): 105-125.
29
30 Fligstein, N., & McAdam, D. 2012. *A theory of fields*. Oxford: Oxford University Press.
31
32 Flyvberg, B. 2006. Making organization research matter: Power, values and phronesis. In
33
34 S.R. Clegg, C. Hardy, T. Lawrence, & W.R. Nord (Eds.), *The Sage handbook of*
35
36 *organization studies*: 370-387. (2nd ed.). London: Sage.
37
38
39 Fogel, R. W. 1964. *Railroads and American economic growth*. Baltimore: Johns Hopkins
40
41 Press.
42
43 Fogel, R. W. 1970. Historiography and retrospective economics. *History and Theory*, 9(3):
44
45 245-264.
46
47
48 Fogel, R. W., & Elton, G. R. 1983. *Which road to the past? Two views of history*. New
49
50 Haven: Yale University Press.
51
52
53 Fogel, R. W., & Engerman, S. L. 1974. *Time on the cross: The economics of American*
54
55 *negro slavery*. London: Wildwood House.
56
57
58
59
60

- 1
2
3 Foucault, M. 1979. *Discipline and punish: The birth of the prison* (A. Sheridan, Trans.).
4
5 Harmondsworth: Penguin.
6
7
8 Freeman, J., Carroll, G. R., & Hannan, M. T. 1983. The liability of newness: Age dependence
9
10 in organizational death rates. *American Sociological Review*, 48(5): 692-710.
11
12 Gabriel, Y. 2000. *Storytelling in organizations: Facts, fictions and fantasies*. Oxford:
13
14 Oxford University Press.
15
16
17 Gaddis, J. L. 2002. *The landscape of history: How historians map the past*. Oxford: OUP.
18
19
20 Garud, R., Jain, S., & Kumaraswamy, A. 2002. Institutional entrepreneurship in the
21
22 sponsorship of common technological standards: The case of Sun Microsystems and
23
24 Java. *Academy of Management Journal*, 45(1): 196-214.
25
26
27 Geertz, C. 1973. *The interpretation of cultures*. New York: Basic Books.
28
29
30 Giddens, A. 1979. *Central problems in social theory: Action, structure and contradiction in*
31
32 *social analysis*. London: Macmillan.
33
34
35 Glaser, B. G., & Strauss, A. 1967. *Discovery of grounded theory: Strategies for qualitative*
36
37 *research*. Chicago, IL: Aldine Publishing Company.
38
39
40 Godfrey, P. C., & Hill, C. W. L. 1995. The problem of unobservables in strategic
41
42 management research. *Strategic Management Journal*, 16(7): 519-533.
43
44
45 Golant, B. D., Sillince, J. A. A., Harvey, C., & Maclean, M. 2014. Rhetoric of stability and
46
47 change: The organizational identity work of institutional leadership. *Human*
48
49 *Relations*, 68(4): 607-631.
50
51
52 Greenwood, A., & Bernardi, A. 2014. Understanding the rift, the (still) uneasy bedfellows of
53
54 history and organization studies. *Organization*, 21(6): 907-932.
55
56
57 Greenwood, R., & Hinings, C. R. 1996. Understanding radical organizational change:
58
59 Bringing together the old and the new institutionalism. *Academy of Management*
60
Review, 21(4): 1022-1054.

- 1
2
3 Greenwood, R., Oliver, C., Sahlin, K., & Suddaby, R. 2008. Introduction. In R. Greenwood,
4 C. Oliver, K. Sahlin & R. Suddaby (Eds.), *The Sage handbook of organizational*
5 *institutionalism*: 1-46. London: Sage.
6
7
8
9
10 Greenwood, R., & Suddaby, R. 2006. Institutional entrepreneurship in mature fields: The big
11 five accounting firms. *Academy of Management Journal*, 49(1): 27-48.
12
13
14 Gulati, R. 2007. Tent poles, tribalism, and boundary spanning: The rigor-relevance debate in
15 management research. *Academy of Management Journal*, 50(4): 775-782.
16
17
18
19 Hall, J. R. 1992. Where history and sociology meet; Forms of discourse and sociohistorical
20 inquiry. *Sociological Theory*, 10(2): 164-193.
21
22
23 Hannan, M. T., & Freeman, J. 1977. The population ecology of organizations. *American*
24 *Journal of Sociology*, 82(5): 929-964.
25
26
27 Hannan, M. T., & Freeman, J. 1984. Structural inertia and organizational change. *American*
28 *Sociological Review*, 49(2): 149-164.
29
30
31
32 Hannan, M. T., & Freeman. 1989. *Organizational ecology*. Cambridge, MA: Harvard
33 University Press.
34
35
36 Hansen, P. H. 2012. Business history: A cultural and narrative approach. *Business History*
37 *Review*, 86(4): 693-717.
38
39
40
41 Harvey, C., Maclean, M., Gordon, J., & Shaw, E. 2011. Andrew Carnegie and the
42 foundations of contemporary entrepreneurial philanthropy. *Business History*, 53(3),
43 424-448.
44
45
46
47 Harvey, C., Press, J., & Maclean, M. 2011. William Morris, cultural leadership and the
48 dynamics of taste. *Business History Review*, 85(2): 245-271.
49
50
51
52 Harvey, S. 2014. Creative synthesis: Exploring the process of extraordinary group creativity.
53 *Academy of Management Review*, 39(3): 324-343.
54
55
56
57
58
59
60

- 1
2
3 Hassard, J. S. 2012. Rethinking the Hawthorne Studies: The Western Electric research in its
4
5 social, political and historical context. *Human Relations*, 65(11): 1431-1461.
6
7
8 Haugaard, M., & Clegg, R. 2009. Introduction: Why power is the central concept in the social
9
10 sciences. In S. R. Clegg & M. Haugaard (Eds.), *The Sage Handbook of power*: 1-24.
11
12 London: Sage.
13
14 Hobsbawm, E. 1983. Introduction: Inventing traditions. In E. Hobsbawm & T. Ranger (Eds.),
15
16 *The invention of tradition*: 1-14. Cambridge: CUP.
17
18
19 Holt, R., & den Hond, F. 2013. Sapere aude. *Organization Studies*, 34(11): 1587-1600.
20
21
22 Hutner, G. 2006. Introduction. In Carnegie, A. 2006a [1920]. *The autobiography of Andrew*
23
24 *Carnegie*: vii-xvi. New York: Signet Classics.
25
26
27 Johnson, V. 2007. What is organizational imprinting? Cultural entrepreneurship in the
28
29 founding of the Paris Opera. *American Journal of Sociology*, 113(1): 97-127.
30
31
32 Judt, T. 1979. A clown in regal purple: Social history and the historians. *History Workshop*,
33
34 7(1): 66-94.
35
36
37 Judt, T., with Snyder, T. 2013. *Thinking the twentieth century*. London: Vintage Books.
38
39
40 Kieser, A. 1994. Crossroads – why organization theory needs historical analyses – and how
41
42 these should be performed. *Organization Science*, 5(4): 608-620.
43
44
45 Kieser, A. 1998. From freemasons to industrious patriots: Organizing and disciplining in 18th
46
47 century Germany. *Organization Studies*, 19(1): 47-71.
48
49
50 Kipping, M., & Üsdiken, B. 2014. History in organization and management theory: More
51
52 than meets the eye. *Academy of Management Annals*, 8(1): 535-588.
53
54
55 Knights, D., & Willmott, H. 1990. *Labour process theory*. Basingstoke: Macmillan.
56
57
58 Kousser, J. M. 1980. Quantitative social-scientific history. In M. Kammen (Ed.), *The past*
59
60 *before us: Contemporary historical writing in the US*: 433-456. Ithaca: Cornell
University Press.

- 1
2
3 Kuhn, T. S. 1970. *The structure of scientific revolutions* (4th ed.). Chicago: University of
4
5 Chicago Press.
6
7 Lamoreaux, N. R., Raff, D. M. G., & Temin, P. 2007. Economic theory and business history.
8
9 In G. Jones & J. Zeitlin (Eds.), *Oxford handbook of business history*: 37-66. Oxford:
10
11 OUP.
12
13
14 Lawrence, T. B., & Phillips, N. 2004. From *Moby Dick* to *Free Willy*: Macro-cultural
15
16 discourse and institutional entrepreneurship in emerging institutional fields.
17
18 *Organization*, 11(5): 689-711.
19
20
21 Lawrence, T., Suddaby, R., & Leca, B. 2011. Institutional work: Refocusing institutional
22
23 studies of organization. *Journal of Management Inquiry*, 20(1): 52-58.
24
25 Leblebici, H. 2014. History and organization theory: Potential for a transdisciplinary
26
27 convergence. In M. Bucheli & R. D. Wadhvani (Eds.), *Organizations in time:*
28
29 *History, theory, method*: 56-99. Oxford: OUP.
30
31
32 Leblebici, H., Salancik, G. R., Copay, A., & King, T. 1991. Institutional change and the
33
34 transformation of interorganizational fields: An organizational history of the US radio
35
36 broadcasting industry. *Administrative Science Quarterly*, 36: 333-363.
37
38
39 Leblebici, H., & Shah, N. 2004. The birth, transformation and regeneration of business
40
41 incubators as new organisational forms: Understanding the interplay between
42
43 organisational history and organisational theory. *Business History*, 46(3): 353-380.
44
45
46 Liebowitz, S. J., & Margolis, S. E. 1995. Path dependence, lock-in and history. *Journal of*
47
48 *Law and Economics*, 11(1): 205-226.
49
50
51 Lippmann, S., & Aldrich, H. E. 2014. History and evolutionary theory. In M. Bucheli & R.
52
53 D. Wadhvani (Eds.), *Organizations in time: History, theory, method*: 124-146.
54
55
56
57
58
59
60

- 1
2
3 Maclean, M., Harvey, C., & Chia, R. 2010. Dominant corporate agents and the power elite in
4
5 France and Britain. *Organization Studies*, 31(3): 327-348.
6
7 Maclean, M., Harvey, C., & Chia, R. 2012. Sensemaking, storytelling and the legitimization
8
9 of elite business careers. *Human Relations*, 65(1): 17-40.
10
11 Maclean, M., Harvey, C., Gordon, J., & Shaw, E. 2015. Identity, storytelling and the
12
13 philanthropic journey. *Human Relations*.
14
15 Maclean, M., Harvey, C., & Press, J. 2006. *Business elites and corporate governance in*
16
17 *France and the UK*. Basingstoke: Palgrave Macmillan.
18
19
20 Maclean, M., Harvey, C., Sillince, J. A. A., & Golant, B. D. 2014. Living up to the past?
21
22 Ideological sensemaking in organizational transition. *Organization*, 21(4): 543-567.
23
24
25 Magnússon, S. G. 2006. Social history as “sites of memory”? The institutionalization of
26
27 history: Microhistory and the grand narrative. *Journal of Social History*, 39(3): 891-
28
29 913.
30
31
32 Maguire, S., Hardy, C., & Lawrence, T. B. 2004. Institutional entrepreneurship in emerging
33
34 fields: HIV/AIDS treatment advocacy in Canada. *Academy of Management Journal*,
35
36 47(5): 657-679.
37
38
39 Mantere, S., Schildt, H.A., & Sillince, J. A. A. 2012. Reversal of strategic change. *Academy*
40
41 *of Management Journal*, 55(1): 172-196.
42
43
44 Martin, J. L. 2003. What is field theory? *American Journal of Sociology*, 109(1): 1-49.
45
46
47 Mayer, R. C., Davis, J. H., & Schoorman, F. D. 1995. An integrative model of organizational
48
49 trust. *Academy of Management Review*, 20(3): 709-734.
50
51
52 McCloskey, D. N. 1991. History, differential equations, and the problem of narration. *History*
53
54 *and Theory*, 30(1): 21-36.
55
56
57 Merleau-Ponty, M. 1962. *Phenomenology of perception* (C. Smith, Trans.). London:
58
59 Routledge and Kegan Paul.
60

- 1
2
3 Meyer, J. & Rowan, B. 1977. Institutionalized organizations: Formal structure as myth and
4
5 ceremony. *American Journal of Sociology*, 83(2): 333-363.
6
7
8 Miller, D., & Shamsie, J. 1996. The resource based view of the firm in two environments:
9
10 The Hollywood film studios from 1936 to 1965. *Academy of Management Journal*,
11
12 39(3): 519-543.
13
14 Mills, A. J., Weatherbee, T. G., Durepos, G. 2013. Reassembling Weber to reveal the-past-as-
15
16 history in management and organization studies. *Organization*, 21(2): 225-243.
17
18
19 Mizruchi, M. S. 2013. *The fracturing of the American corporate elite*. Cambridge, MA;
20
21 Harvard University Press.
22
23 Morgan, K. J., & Prasad, M. 2009. The origins of tax systems: A French-American
24
25 comparison. *American Journal of Sociology*, 114(5): 1350-1394.
26
27
28 Munir, K. A., & Phillips, N. 2005. The birth of the “Kodak moment”: Institutional
29
30 entrepreneurship and the adoption of new technologies. *Organization Studies*, 26(11):
31
32 1165-1687.
33
34
35 Nasaw, D. (Ed.). 2006. *Andrew Carnegie*. New York: Penguin.
36
37
38 Nelson, R. R., & Winter, S. G. 1982. *An evolutionary theory of economic change*.
39
40 Cambridge, MA: Harvard University Press.
41
42
43 Newton, T. 2004. From freemasons to the employee: Organization, history and subjectivity.
44
45 *Organization Studies*, 25(8): 1363-1387.
46
47
48 North, D. C. 1990. *Institutions, institutional change and economic performance*.
49
50 Cambridge: CUP.
51
52
53 O’Connor, E. S. 2000. Plotting the organization: The embedded narrative as a construct for
54
55 studying change. *Journal of Applied Behavioral Science*, 36(2): 174-192.
56
57
58 O’Sullivan, M., & Graham, M. B. 2010. Moving forward by looking backward: Business
59
60 history and management studies. *Journal of Management Studies*, 47(5): 775-790.

- 1
2
3 Pettigrew, A. 1985. *The awakening giant: Continuity and change in ICI*. Oxford:
4
5 Blackwell.
6
- 7 Piketty, T. 2014. *Capital in the twenty-first century* (A. Goldhammer, Trans.). Cambridge,
8
9 MA: Harvard University Press.
10
- 11 Popp, A., & Holt, R. 2013. The presence of entrepreneurial opportunity. *Business History*,
12
13 55(1): 9-28.
14
15
- 16 Putnam, L. 2006. To study the fragments/whole: Microhistory and the Atlantic world.
17
18 *Journal of Social History*, 39(3): 615-630.
19
- 20 Raff, D. M. G. 2000. Superstores and the evolution of firm capabilities in American
21
22 bookselling. *Strategic Management Journal*, 21: 1043-1059.
23
24
- 25 Rhodes, C., & Brown, A. D. 2005. Narrative, organizations and research. *International*
26
27 *Journal of Management Reviews*, 7(3): 167-188.
28
- 29 Ricoeur, P. 1978. Explanation and understanding. In C. E. Reagan & D. Stewart (Eds.), *The*
30
31 *philosophy of Paul Ricoeur: An anthology of his work*: 149-166. Boston, MA:
32
33 Beacon Press.
34
35
- 36 Roe, R. A., Waller, M. J., & Clegg, S. R. (Eds.). 2008. *Time in organizational research*.
37
38 Oxford: Routledge.
39
- 40 Rojas, F. 2010. Power through institutional work: Acquiring academic authority in the 1968
41
42 Third World strike. *Academy of Management Review*, 53(6): 1263-1280.
43
44
- 45 Rowlinson, M., Booth, C., Clark, P., Delahaye, A., & Procter, S. 2010. Social remembering
46
47 and organizational memory. *Organization Studies*, 31(1): 69-87.
48
- 49 Rowlinson, M., & Hassard, J. 1993. The invention of corporate culture: A history of the
50
51 histories of Cadbury. *Human Relations*, 46(3): 299-326.
52
53
54
55
56
57
58
59
60

- 1
2
3 Rowlinson, M., & Hassard, J. S. 2013. Historical neo-institutionalism or neo-institutionalist
4
5 history? Historical research in management and organizational studies. *Management*
6
7 *& Organizational History*, 8(2): 111-126.
8
9
10 Rowlinson, M., Hassard, J., & Decker, S. 2014. Strategies for organizational history: A
11
12 dialogue between historical theory and organization theory. *Academy of Management*
13
14 *Review*, 39(3): 250-274.
15
16 Roy, A. 2000. Microstoria: Indian nationalism's "little stories" in Amitav Ghosh's *The*
17
18 *Shadow Lines*. *The Journal of Commonwealth Literature*, 35(2): 35-49.
19
20
21 Ruef, M. 2004. The demise of an organizational form: Emancipation and plantation
22
23 agriculture in the American south, 1860-1880. *American Journal of Sociology*,
24
25 109(6): 1365-1410.
26
27
28 Ruef, M. 2012. Constructing labor markets: The valuation of black labor in the U.S. South,
29
30 1831 to 1867. *American Sociological Review*, 77(6): 970-998.
31
32
33 Ruef, M., & Fletcher, B. 2003. Legacies of American slavery: Status attainment among
34
35 Southern blacks after emancipation. *Social Forces*, 82(2): 445-480.
36
37
38 Ruef, M., & Patterson, K. 2009. Credit and classification: The impact of industry boundaries
39
40 in nineteenth-century America. *Administrative Science Quarterly*, 54: 486-520.
41
42 Selznick, P. 1949. *TVA and the grassroots: A study in the sociology of formal organization*.
43
44 Berkeley, CA: University of California Press.
45
46 Selznick, P. 1957. *Leadership in administration: A sociological interpretation*. Berkeley
47
48 and Los Angeles: University of California Press.
49
50 Selznick, P. 1996. Institutionalism "old" and "new". *Administrative Science Quarterly*, 41:
51
52 270-277.
53
54
55 Seo, M.-G., & Creed, W. E. D. 2002. Institutional contradictions, praxis, and institutional
56
57 change: A dialectical perspective. *Academy of Management Review*, 27(2): 222-247.
58
59
60

- 1
2
3 Sewell, W. H. 2005. *Logics of history: Social theory and social transformation*. Chicago:
4
5 University of Chicago Press.
6
7
8 Shane, S., & Venkataraman, S. 2000. The promise of entrepreneurship as a field of research.
9
10 *Academy of Management Review*, 25(1): 217-226.
11
12 Steinmetz, G. 2007a. The relations between sociology and history in the United States: The
13
14 current state of affairs. *Journal of Historical Sociology*, 20(1/2): 1-12.
15
16 Steinmetz, G. 2007b. Transdisciplinarity as a nonimperial encounter: For an open sociology.
17
18 *Thesis Eleven*, 91(1): 48-65.
19
20
21 Stinchcombe, A. L. 1965. Social structure and organizations. In J. G. March (Ed.), *Handbook*
22
23 *of organizations*: 142-193. Chicago: Rand McNally.
24
25
26 Suchman, M. C. 1995. Managing legitimacy: Strategic and institutional approaches.
27
28 *Academy of Management Review*, 20(3): 571-610.
29
30
31 Suddaby, R. 2010a. Challenges for institutional theory. *Journal of Management Inquiry*,
32
33 19(1): 14-20.
34
35
36 Suddaby, R. 2010b. Editor's comments: Construct clarity in theories of management and
37
38 organization. *Academy of Management Review*, 35(3): 346-357.
39
40
41 Suddaby, R., Elsbach, K. D., Greenwood, R., Meyer, J. W., & Zilber, T. B. 2010.
42
43 Organizations and their institutional environments – Bringing meaning, values, and
44
45 culture back in: Introduction to the special research forum. *Academy of Management*
46
47 *Journal*, 53(6): 1234-1240.
48
49
50 Suddaby, R., Foster, W. M., & Mills, A. J. 2014. Historical institutionalism. In M. Bucheli &
51
52 R. D. Wadhvani (Eds.), *Organizations in time: History, theory, method*: 100-123.
53
54
55 Oxford: OUP.
56
57
58 Suddaby, R., Foster, W. M., & Trank, C. Q. 2010. Rhetorical history as a source of
59
60 competitive advantage. *Advances in Strategic Management*, 27: 147-173.

- 1
2
3 Suddaby, R. & Greenwood, R. 2009. Methodological issues in researching institutional
4
5 change. In D. A. Buchanan & A. Bryman (Eds.), *The Sage handbook of*
6
7 *organizational research methods*: 176-195. London: Sage.
8
- 9
10 Suddaby, R., Hardy, C., & Huy, Q. N. 2011. Introduction to special topic forum: Where are
11
12 the new theories of organization? *Academy of Management Review*, 36(2): 236-246.
13
- 14 Sydow, J., Schreyögg, G., & Koch, J. 2009. Organizational path dependence: Opening the
15
16 black box. *Academy of Management Review*, 34(4): 689-709.
17
- 18 Teece, D. J., Pisano, G., & Shuen, A. 1997. Dynamic capabilities and strategic management.
19
20 *Strategic Management Journal*, 18(7): 509-533.
21
- 22 Tilly, C. 2004. *Social movements, 1768-2004*. Boulder, CO: Paradigm Publishers.
23
- 24 Tushman, M. L., & O'Reilly, C. A. 1996. Ambidextrous organizations: Managing
25
26 evolutionary and revolutionary change. *California Management Review*, 38(4): 8-30.
27
- 28 Ulrich, L. T. 1991. *A midwife's tale: The life of Martha Ballard, based on her diary, 1785-*
29
30 *1812*. New York: Vintage Books.
31
- 32 Üsdiken, B., & Kieser, A. 2004. Introduction: History in organisation studies. *Business*
33
34 *History*, 46(3): 321-330.
35
- 36 Üsdiken, B., & Kipping, M. 2014. History and organization studies: A long-term view. In M.
37
38 Bucheli & R. D. Wadhvani (Eds.), *Organizations in time: History, theory, method:*
39
40 33-55. Oxford: OUP.
41
- 42 Wadhvani, R. D., & Jones, G. 2014. Schumpeter's plea: Historical reasoning in
43
44 entrepreneurship theory and research. In M. Bucheli & R. D. Wadhvani (Eds.),
45
46 *Organizations in time: History, theory, method:* 192-216. Oxford: OUP.
47
48
49
50
51
- 52 Wallerstein, I. 2004. *World-systems analysis: An introduction*. London: Duke University
53
54 Press.
55
56
57
58
59
60

- 1
2
3 Weber, M. 1947. *The theory of social and economic organization* (A. M. Henderson & T.
4
5 Parsons, Trans.). New York: OUP.
6
7 Weick, K. E. 1995. *Sensemaking in organizations*. Thousand Oaks, CA: Sage.
8
9
10 Wernerfelt, B. 1984. A resource-based view of the firm. *Strategic Management Journal*,
11
12 5(2): 171-180.
13
14 White, H. 1987. *The content of the form: Narrative discourse and historical representation*.
15
16 Baltimore: Johns Hopkins University Press.
17
18
19 Williamson, O. 1979. Transaction-cost economics: The governance of contractual relations.
20
21 *Journal of Law and Economics*, 22(2): 233-261.
22
23 Zald, M. N. 1993. Organization studies as a scientific and humanistic enterprise: Toward a
24
25 reconceptualization of the foundations of the field. *Organization Science*, 4(4): 513-
26
27 528.
28
29
30 Zald, M. N. 1996. More fragmentation? Unfinished business in linking the social sciences
31
32 and the humanities. *Administrative Science Quarterly*, 41: 251-261.
33
34
35
36
37
38
39
40
41
42
43
44
45
46
47
48
49
50
51
52
53
54
55
56
57
58
59
60

1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28
29
30
31
32
33
34
35
36
37
38
39
40
41
42
43
44
45
46
47
48
49
50
51
52
53
54
55
56
57
58
59
60

FIGURE 1

Four Conceptions of History in Organization Studies

		PURPOSE	
		Exposition	Interpretation
M O D E	Social Scientific	<p>Evaluating</p> <p>History used in testing and refining theory and arguments</p>	<p>Explicating</p> <p>History used in applying and developing theory to reveal the operation of transformative social processes</p>
	Narrative	<p>Conceptualizing</p> <p>History used in generating new theoretical constructs</p>	<p>Narrating</p> <p>History used to explain the form and origins of significant contemporary phenomena</p>

TABLE 1

Types and Principles of Historical Organization Studies

TYPES PRINCIPLES	Evaluating (testing and refining theory and arguments)	Explicating (revealing the operation of social processes)	Conceptualizing (generating new constructs)	Narrating (explaining origins of contemporary phenomena)
Dual Integrity (historical veracity and conceptual rigor)	<i>Essential</i> in creating historical organization studies of all types attentive to the fundamental values of both disciplines			
Pluralistic Understanding (openness to alternatives and different ways of seeing)	<i>Useful</i> in suggesting alternative hypotheses	<i>Useful</i> in developing nuanced understandings of specific events and outcomes	<i>Important</i> in stimulating creative thinking and theoretical boldness	<i>Useful</i> in making connections to discern patterns, sequences and associations
Representational Truth (congruence between evidence, logic and interpretation)	<i>Important</i> in confirming, adopting or rejecting theoretical ideas	<i>Important</i> in validating inferences drawn from interplay of theory and data	<i>Useful</i> in establishing empirical plausibility of new constructs	<i>Important</i> in demonstrating goodness-of-fit between evidence and interpretation
Context Sensitivity (attentiveness to historical specificities)	<i>Useful</i> in unsettling fixed conceptions and re-evaluating past judgements	<i>Important</i> in distinguishing between general and particular forces in change processes	<i>Useful</i> in identifying contingencies that shape particular outcomes	<i>Important</i> in revealing the formative influence of situated environments
Theoretical Fluency (command of conceptual terrain)	<i>Important</i> in interrogating and refining existing theories	<i>Important</i> in identifying transformative social processes	<i>Important</i> in engendering new constructs and demonstrating novelty	<i>Useful</i> in discerning critical relationships and causal forces

1
2
3
4 **Mairi Maclean** (mairi.maclean@ncl.ac.uk) is Professor of International Management and
5 Organization Studies at Newcastle University Business School, where she is Director of
6 Research. She received her PhD from the University of St Andrews, Scotland. Her research
7 focuses upon international business elites and elite power, historical organization studies, and
8 entrepreneurial philanthropy.
9

10
11 **Charles Harvey** (Charles.Harvey@ncl.ac.uk) is Professor of Business History and
12 Management at Newcastle University. He has a PhD in international business from the
13 University of Bristol. His research focuses upon the historical processes that inform
14 contemporary business practice and the exercise of power by elite groups in society.
15

16 **Stewart Clegg** (Stewart.Clegg@uts.edu.au) is Professor of Management and Director of the
17 Centre for Management and Organisation Studies at the University of Technology, Sydney.
18 He received his doctorate from the University of Bradford. His research focuses on power,
19 class, networks, politics, management, history and strategy in organizations and society-at-
20 large.
21
22
23
24
25
26
27
28
29
30
31
32
33
34
35
36
37
38
39
40
41
42
43
44
45
46
47
48
49
50
51
52
53
54
55
56
57
58
59
60