HISTORICAL ORGANIZATION STUDIES

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Chapter 1

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Advancing new directions for organizational research

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Introduction

Historical organization studies is 'organizational research that draws extensively on historical sources, methods and knowledge to promote historically informed theoretical narratives attentive to both disciplines' (Maclean, Harvey and Clegg, 2016: 609). Put simply, it seeks to blend history and organization studies. The present status of historical organization studies is that of an emergent academic movement rather than an established community of practice. For more than two decades, organization theorists have pointed to the need for more and better research that recognizes the importance of the past in shaping the present and influencing the future (Kieser, 1994; Zald, 1993). Some have identified a distinct 'historic turn' in organization studies, an epistemological shift led by scholars who perceive the field to have been constrained by its orientation towards contemporary cross-sectional studies covering limited periods of time (Clark and Rowlinson, 2004; Mills, Suddaby, Foster and Durepos, 2016). By *historicizing* organizational research, it is argued, the contexts and forces bearing upon organizations might be more fully recognized and analyses of organizational dynamics might be improved.

How, precisely, might organizational research be *historicized*? How might a traditionally empirically oriented discipline such as history be incorporated into a theoretically oriented discipline such as organization studies? How might the power of history be harnessed to advance the explanatory potential of organization theory? What might history tangibly contribute to our knowledge of management and organizations (Clegg, 2006; Clegg and Courpasson, 2007)? We are now embarking on a new stage in the establishment of historical organization studies as a distinctive epistemological and methodological approach that develops a historical research strategy within the broad field of organization studies. This book makes a timely intervention that advances the discussion while extending and deepening

what has already been achieved. Hence, it offers a mixture of conceptual and theoretically informed empirical papers that help to define the field and to orient it further in future. In this way, the book serves both as a landmark in the development of the field and as an important milestone in building an emergent and strengthening community of scholars. It thereby contributes to the reimagining of historical organizational studies while advancing new directions for organizational research. This chapter takes stock by evaluating the current state of play, explores recent scholarly exemplars on theorized history, while looking at the possibilities offered for future research.

Advancing new directions

The integration of history with organization studies has been the topic of extensive debate in recent years. Indeed, the genesis of the present book lies in the European Group for Organizational Studies' (EGOS) sub-theme on 'Historical organization studies: Realizing the potential', held at the EGOS colloquium in Edinburgh in July 2019. The sub-theme was so successful and attracted so many papers that it ran as two parallel streams. It continued the momentum established by an EGOS standing working group on organizational history, in which participants, alongside members of the Management History division of the Academy of Management, worked energetically for several years. The fruits of that work have found expression in a number of ground-breaking publications and avenues for future exploration (Bucheli and Wadhwani, 2014; Kipping and Üsdiken, 2014; Maclean et al., 2016; Rowlinson, Hassard and Decker, 2014). These activities have been accompanied by a flurry of special issues in journals such as the *Academy of Management Review, Organization Studies, Management Learning, Organization*, the *Revista de Administração de Empresas* and the *Strategic Management Journal*. The notion of historical organization studies emerged from this scholarly fulcrum.

The first main contribution of this literature has been to specify the problems inherent in reconciling disciplinary traditions. In terms of history and organization studies, these are summarized by Rowlinson et al. (2014) as three epistemological dualisms: in organization studies, the prioritization of analysis, self-generated data and simple chronology differ fundamentally from the prioritization by historians of narrative, documentary sources and periodization. The second main contribution of this foundational literature is to demonstrate how these differences might fruitfully be overcome. Kipping and Üsdiken (2014) suggest three modes of correspondence between history and organization theory: history as a means of testing theory, history informing theoretical perspectives and history lending complexity to theorization.

Building on these insights, Maclean, Harvey and Clegg (2016; 2017) elaborate the idea of historical organization studies – organizational research that embeds organizing and organizations in their socio-historical context(s) to generate historically informed theoretical narratives attentive to both disciplines. These authors point out that there has been a good deal more longitudinal research in

organization studies than is commonly acknowledged. They propose a typology entailing four differing conceptions of history in organizational research. First, history as evaluating, where history is used as a means of testing and refining theory and arguments. Such an approach recognizes that theory testing can benefit from a greater focus on context and temporality. It also acknowledges that, over time, events may be subject to reinterpretation and re-evaluation, the nature of history being that it is constantly open to debate. Second, history as explicating, where history is used in applying and developing theory to uncover the operation of transformative social processes. This entails employing historical data to probe theories that unearth causal mechanisms. Third, history as conceptualizing, where history is employed to generate new theoretical constructs, seeking to 'stretch the scope of explanations' (Lippmann and Aldrich, 2014: 128) by drawing lessons and generalizing inductively from empirical data and particular historical cases. Fourth, history as narrating, where history is used to explain the form and origins of significant contemporary phenomena (Maclean et al., 2016: 612). History as conceptualizing arguably offers the most scope for demonstrating conceptual originality in historical research, where theorization becomes more explicit, promoting the development of rich, robust historical scholarship. History as narrating nevertheless remains perhaps the most frequent mode of employing history in organizational research. As White (1987: 169) observes, 'Getting the "story" out of "history" was … a first step in the transformation of historical studies into a science'. For Ricoeur, narrative is humanizing, with history being a humanizing endeavour. So profound is the connection with narration that, for Ricoeur (1983: 177), history cannot depart from narrative 'without losing its historical character'. The production of a historical narrative is thus a composite process that implicates characters, events and authors in generating a unified, theoretically sensitive narrative analysis, in which theorization is largely implicit (Taylor, Bell and Cooke, 2009). Such an approach illuminates the nature of organizational history as historically constituted through language, replacing any conception of an objective historical reality with another, more open to social construction (Heller and Rowlinson, 2019; Maclean, Harvey, Sillince and Golant, 2018).

To accomplish historical organization studies, Maclean, Harvey and Clegg (2016; 2017) further identify five principles of historical organization studies designed to promote a closer union between history and organization theory. These are: dual integrity, pluralistic understanding, representational truth, context sensitivity and theoretical fluency (Maclean et al., 2016: 617). *Dual integrity* underscores the importance of both historical veracity and conceptual rigour, extending mutual respect to history and organization studies in uniting the two, such that each discipline informs and enhances the other without either becoming the driver of the other. We contend that historically informed theoretical narratives cognizant of both disciplines, the authenticity of which inheres in both theoretical interpretation and historical veracity, make a strong and singular claim to scholarly legitimacy. Given its centrality, *dual integrity* serves as an overarching 'master principle' for the remaining four. *Pluralistic understanding* signals an openness to alternatives and new

ways of seeing, such that other kinds of understanding are accommodated in historical studies, embracing and reclaiming space for alterity within them and recognizing the richness that different perspectives bring. *Representational truth* denotes the congruence between evidence, logic and interpretation, to which authenticity and its construction are key, underlining the importance of 'ringing true' (Judt and Snyder, 2013). Representational truth underlines the vital relationship of trust researchers have not only with their audience but also with the subjects of their research (Taylor et al., 2009). As Rowlinson et al. (2014) observe, the fictionalization of organizations which is commonplace in organization studies prevents verification, emphasizing the importance of historical veracity in historical organization studies. *Context sensitivity* highlights attentiveness to historical specificities to promote a more contextualized appreciation of organizations which recognizes that these are moulded by the particular situational genesis from which they emerged (Aldrich, Ruef and Lippmann, 2020). The uniqueness of contextual conditions need not preclude generalizability. As Collingwood (1993: 396) argues persuasively, 'we learn by experience how to handle cases of influenza, without being held to the doctrine that all cases of influenza exactly resemble each other'. Finally, *theoretical fluency* points to the importance of mastering the relevant conceptual terrain, making more and better sense of historical cases by viewing them through an appropriate cognitive lens which enables scholars to see and understand better. Theoretical fluency encourages a more explicit theorization of temporal elements to develop insightful, substantive understanding of organizations and organizing, while recognizing that abstract concepts might be associated with case-specific, contextualized historical understanding.

We are now entering a new phase in establishing historical organization studies as a distinctive epistemological and methodological approach within the wide-ranging field of organization studies, concerned above all with putting *historical organization studies into action*. Scholars have been using organizational research in historical work for many years, but implicitly and largely unarticulated. As a singular type of reasoning it is now becoming more epistemologically and methodologically explicit (Suddaby, Coraiola, Harvey and Foster, 2020). Often what is dealt with is partial, very fragmentary data created for other purposes – 'shards created by the selection of materials, remainders left aside by an explication … on the edges of discourses or in its rifts and crannies' (de Certeau, 1988: 4). The often fragmentary nature of the data, however, does not preclude meaningful insights being derived from the scrutiny of telling detail.

Such empirically founded research is not inimical to theory. Nor are theoretical approaches antithetical to organizational history, despite a longstanding aversion to theory on the part of some practising historians (Rowlinson et al., 2014). Historical organization studies aim to promote a structured dialogue between theoretical perspectives and empirical phenomena, fostering a fluid integration of theory with empirical observation (Harvey and Jones, 1990). Both theory and empirical research have much to offer the other. Although 'theory may help block out major dimensions of the narrative's plot, it still leaves a residue of events and aspects

unexplained' (Hall, 1992: 185). Empirical research affords the 'thick description' of context to build and illuminate theory, which may provide an inductive foundation for elaborating theoretical insights (Geertz, 1973: 14). Delving into the historical, sociocultural specificities in which phenomena are embedded enhances historical understanding, which can lead to new theories. Without empirical depth, the danger is that organizational theory becomes disembodied from the practicalities of organizational existence (Sandberg and Tsoukas, 2011; Suddaby, Hardy and Huy, 2011). At the same time, empirical observation warns against the naïve assumption that contemporary phenomena are necessarily 'new' (Jones and Khanna, 2006). In a field as in thrall to the new as management and organization studies, such scepticism is acutely necessary.

More explicit theoretical narratives can bring contexts to life, uncovering how actors in the past have succeeded in navigating complexity (Langley, 1999; Lippmann and Aldrich, 2014). Theory can frame, energize and lend coherence to a research project (Hall, 1992). Theoretical interpretations can be refined and recalibrated through historical study and elucidation. Broader themes, such as sense-making, can reach out to wider audiences. Shared perspectives offer a means for scholars from different backgrounds to have conversations, encouraging meaningful interdisciplinary dialogue between proponents of varying discourses and amplifying relevance. There is an evident tension between uniqueness and isomorphism in organizational research, between contextual specificities and universalist inclinations. Organizational case study research is founded on a premise of replication (Eisenhardt, 1989). Yet, as Deleuze (2004) has argued compellingly, human beings paradoxically copy in order to establish difference. Although historians have often been reluctant to acknowledge that there may be general mechanisms influencing organizational behaviour, it is in the productive *interplay* between theoretical perspectives and empirical observation that empirically founded organizational research has much to contribute.

Already, there are strong examples of original theorization based on historical analysis and historical sources. Suddaby, Foster and Quinn-Trank (2010) have put forward the construct of *rhetorical history* as a potentially valuable, rare, inimitable and malleable resource to affirm the importance of a company's history in shaping opinion and influencing action. This has implications for organizational remembering and identity work, casting light on the 'mnemonic manifestations' of past events and how these may impact on identity work across time (Judt and Snyder, 2013: 276; Suddaby et al., 2016). What is remembered and what is forgotten shape an organization's image and identity (Anteby and Molnár, 2012), opening up possibilities for the reuse of company mottos or artefacts for new purposes years later (Hatch and Schultz, 2017). Suddaby, Foster and Mills (2014) draw attention to the need for an enhanced sensitivity to the inherent historical nature of institutions in developing the notion of *historical institutionalism*. Such an approach acknowledges that, with time, organizations become infused with meaning in a way that transcends their initial purpose, and that institutionalization is in essence an intrinsically historical operation (Selznick, 1957). Durepos, Mills and Helms Mills (2008)

advance the concept of *ANTi-History*, drawing on actor–network theory as a critical lens through which to consider the sociopolitical process of writing a company history, accentuating the importance of locating companies in the broader 'sociopasts' in which they originated. Mutch (2018) employs history as a means of reframing institutional logics through his work on taken-for-granted historical practices. Vaara and Lamberg (2016) emphasize the need to understand the *historical embeddedness* of strategic processes and practices. Harvey, Maclean et al. (2011) propose a *transactional model* of entrepreneurial philanthropy based on Bourdieu's capital theory in an examination of the life of Andrew Carnegie (see also Harvey, Maclean and Suddaby, 2019). Drawing similarly on Bourdieusian theory, Harvey, Press and Maclean (2011) explore how tastes are formed, transmitted, embedded and reproduced across generations. Gasparin, Green and Schinckus (2019) highlight *historical sensemaking* that emphasizes how individuals seek patterned means of making sense of events on the basis that 'historical time is an essential dimension of the sensemaking and sensegiving of human actors' (Wadhwani and Jones, 2014: 208). Wadhwani and Jones (2014) underline the role of *historical reasoning* as a way of illuminating key aspects of the entrepreneurial process by addressing temporal assumptions explicitly and reflexively. Stutz and Sachs (2018) underscore the potential for a reflexive historical lens to contribute to research on corporate social responsibility (CSR), developing a research strategy attuned to the normative agenda of CSR which they term the *reflexive historical case study*. Luyckx and Janssens (2020) explore the role of ideological *discursive strategies* in (de)legitimacy struggles in the Great Recession in Belgium (see also Maclean, Harvey, Sillince and Golant, 2014; Maclean, Harvey, Golant and Sillince, 2020). Perchard and McKenzie (2020) examine the contribution that historical perspectives and methods can make to elucidating organizational *path dependence* in the context of the British aluminium industry. Scholars have also begun to explore the *uses of the past* in organizing, investigating, for example, the enduring influence of organizational founders often long after their decease (Basque and Langley, 2018; Maclean, Harvey, Suddaby and O'Gorman, 2018; Wadhwani, Suddaby, Mordhorst and Popp, 2018).

Interest is beginning to be focused on how the Global South might contribute to an agenda which hitherto has remained resolutely western in orientation, dominated by western-style rationality and 'narrative imperialism' (Phelan, 2005), impeding ethnic diversity and leaving little room for engagement with 'the other' (de Certeau, 1988: 3). Recent special issues on the topic of historical organization studies have sought to grapple with this issue (Barros, Coraiola, Maclean and Foster, 2021; Durepos, Maclean, Alcadipani and Cummings, 2020). In novel fashion, Pio and Syed (2020) explore the contribution that ancient inscriptions in India, Aśokan (273–232 BC) stelae, can make to expand our understanding of management learning on diversity.

In related fashion, researchers have begun to reinvestigate the origins of management education globally, finding that the principles of American management were not always as readily absorbed elsewhere as is often believed, but were resisted

and nuanced to accommodate different cultural actualities (Cooke and Alcadipani, 2015; Üsdiken, 1997). Maclean, Shaw, Harvey and Booth (2020) show how dynamic knowledge networks known as 'management research groups' advanced practice-based learning to provide effective solutions to shared problems in inter-war Britain. Given that history is constitutive (Jenkins, 2003), reconsidering the origins of management education and practice around the world may recast our understanding of these in the present and future (Cummings and Bridgman, 2011; Cummings, Bridgman, Hassard and Rowlinson, 2017; Khurana, 2007).

Historical organization studies demand both methodological and epistemological rigour (Maclean, Harvey and Stringfellow, 2017). Dual integrity rests on sound and robust investigatory procedures which pay due regard to the exacting standards applied in both organizational research and in history, where each is seen as com-plementary to the other. Wider methodological reflection drawn from the former can enliven debate and entail historiographical reflexivity in the latter (Decker, Rowlinson and Hassard, 2020). The 'rules of evidence', of verification, must be respected and observed (White, 1987: 67). The alternative would be for historical organization studies to condone a dilution of methodological standards, which would flout our overarching principle of dual integrity. It is precisely owing to unease over a potential lowering of the exacting standards demanded by history that some business historians have been wary of promoting greater use of history in organization studies, concerned that a preoccupation with theory might be linked to a lack of respect for and sensitivity to history. Bruce (2020) argues that there is currently a battle ongoing for the heart and soul of management and organizational history. White (1987: 164) warns of the dangers of historical dilettantism:

> If one is going to 'go to history', one had better have an address in mind rather than go wandering around the streets of the past like a *flaneur*. Historical *flaneurisme* is undeniably enjoyable, but the history we are living today is no place for tourists.

Organization theorists have related epistemological concerns centring on the 'uncritical embracing of history as an explanation of organizational structure, pro-cesses, and outcomes' (Kieser, 1994: 608). Yet, as the examples of theorization founded on historical analysis illustrated above have shown, history can be used to generate new theory (Suddaby et al., 2011; 2020). Methodological transparency is fundamental not only to spark interdisciplinary conversations and so build audi-ences for scholarship, but also to the important task of scholarly legitimation (McKenzie, Gordon and Gannon, 2019; Smith and Umemura, 2019). Scholarly communities function according to agreed norms of publication (Suddaby et al., 2011), and attracting scholarly legitimacy rests on evidence of authenticity and relevance. Being relevant is the taken-for-granted fundament of organization stu-dies as a discipline. Transparency in the use of methods of both disciplines is likely to enable scholars of historical organization studies to self-construct their own relevance, and to shape the field accordingly.

The fragmentary data on which organizational historians regularly draw is often located in archives. Archival analysis exemplifies 'the historian's empirical method of choice' (Cooke and Alcadipani, 2015: 483). Yet, despite increasing exhortations to take history seriously, management scholars who venture into archives to use the sources to be found there remain relatively few and far between (McKinlay, 2013). There are, of course, exceptions to this (Tennent, Gillett and Foster, 2020; Maclean, Shaw et al., 2020), including many of the chapters featured in this volume. Cummings et al. (2017) stress that archival work is demanding. Critical issues revolve around access, copyright and digitization, demanding skilful negotiation on the part of the organizational researcher. Archives involve layers of accessibility. Visitors accorded access enter unknown territory where they are dependent on the cooperation of archivists, who serve as key gatekeepers. Archives themselves are often incomplete (Cooke and Alcadipani, 2015). Moreover, they are not objective, disinterested places, but rather are implicated in power relations, being spaces where material has been selected and sifted through, where knowledge is produced and inscribed and discourse is formed (de Certeau, 1988; Foucault, 2002; Schwarzkopf, 2012). This underscores the importance of the *values* that organization scholars bring to history and that animate and frame their research (White, 1987: 164).

The assumptive epistemological historical dynamic that remains tacit and largely unacknowledged in much organizational research is uncovered and laid bare in historical organization studies (Suddaby et al., 2014). Attention to time and temporalities comes to the fore, illuminating past, present and projected futures (Hernes, 2014; Sewell, 2005). Braudel (1980) emphasizes the need to study very long expanses of time and to enquire what might be learned from these. An evolutionary approach of this nature can extend the scope of explication, casting light on the outcomes of long-lived historical processes. The long-run effects of specific courses of action may only be apparent over a lengthy timescale (Barton, Horváth and Kipping, 2016; Jones and Khanna, 2006), which is not to rid history of its messiness and contingency (Lippmann and Aldrich, 2014). Critical incidents and crucible events occur, take shape and emerge within 'these depths, this semistillness' that the *longue durée* frames (Braudel, 1980: 33). What Braudel (1980: 26) terms the 'dialectic of duration' implies long-lasting movements punctuated by shorter bursts of activity. Historians often begin from present concerns, such that the past represents a 'reconstitution of societies and human beings engaged in the network of human realities of today' (de Certeau, 1988: 11). Past and present are mutually implicated inasmuch as the 'function of history is to promote a profounder understanding of both past and present through the interrelation between them' (Carr, 1990: 68). History thus has a 'living role' to play whereby conceptualizations of past phenomena are subject to reinterpretation and re-evaluation over time as circumstances change and evolve (Ericson, Melin and Popp, 2015: 506). Although history is essentially backward-looking, in fact a forward-looking perspective gives scope for rethinking and reimagining, which may in turn enable alternative histories to develop and be written (Cummings and Bridgman, 2011;

Raff, 2013). It is in the interaction between these temporal perspectives – 'the dialectic of coming to be, having been, and making present' (Ricoeur, 1983: 61) – that the greatest scope resides for making meaningful contributions.

In other words, any historical project concerns not just history in the past but also history in the present and future, affecting the scope conditions wherein current and future choices are made (Schultz and Hernes, 2013; Wadhwani and Bucheli, 2014). Looking ahead to the prospects and challenges that historical organization studies must embrace, we collectively carve out space for new directions within the terrain of organizational research.

Historical organization studies in practice

Conceptual contributions

The writing of history, de Certeau (1988: xxvi) observes, concerns 'the study of writing as historical practice'. In Part II of our edited collection, Alistair Mutch explores whether it is possible to examine practices through historical study (Chapter 2). The study in question, founded on rich archival research, concerns the seemingly mundane practices performed in the rural parishes of the Churches of Scotland and England, which in turn shed light on differing ecclesiastical routines performed in the two churches. Although it is rare for organization theorists to examine organizations prior to the nineteenth century (Casson and Casson, 2013; Kieser, 1998; Newton, 2004), this comparative investigation delves into the intricacies and telling details of eighteenth-century church governance. Mutch points to the need to study practices as nouns, not verbs. What he finds is, first, that practices, even when identical in name, are moulded by specific temporal and spatial conjunctures. Second, he highlights that practices themselves have a history, albeit one which is often submerged in taken-for-granted routines that rarely emerge from the shadows of a past shrouding their sense. Where there is reification and solidification of past practices into rituals and routines, which are more available to scrutiny, the historical investigation of such practices is made possible. The great bulk of practice research, Mutch argues, fails to take account of the fact that routines are historically generated. Investigating them in this way may reveal novel, surprising aspects of the sociopolitical identities of the communities from which they took shape and form.

Critical history, according to Collingwood (1993: 386), can be applied to an infinite variety of topics, 'all of which become historical sources so far as historians can find ways of employing them as such'. In an innovative chapter on historical reflexivity (Chapter 3), Durepos and Vince blend emotion in organizations with a historical organization studies approach to focus on individual career achievement in the neo-liberal university, imbued with a logic of efficiency and productivity. Reflexivity, they assert, comprises an implicit historical aspect. Historical reflexivity is an iteratively reflective process whereby individuals create, both retrospectively and prospectively, nonlinear narratives of their past, present and future practices, animated

by their own embodied history (Maclean, Harvey and Chia, 2012a). History is thus not only socially constructed, but also ontologically constitutive (Jenkins, 2003). In other words, we elaborate history as we engage in inscribing our lives. Durepos and Vince offer a more personal, reflexive take on historical organization studies that brings to the fore the lived experience of organizations. Their chapter is informed by a non-chronological conception of history, infused by emotion, which unsettles conventional ordering and implies a new relationship with past, present and future. Academics can recover meaning in their own lives, they conclude, by engaging in writing as a means of composing, and hence perhaps also discovering, the self.

Richard Badham, Todd Bridgman and Stephen Cummings take a novel approach to historical organization studies by critically exploring the genesis, history and evolution of a longstanding metaphor in organization theory, the iceberg, examining its continued relevance and reflexive use today (Chapter 4). It was de Certeau (1988: 312) who observed that metaphors used in history can signify many different things simultaneously, congealing into images whose meanings intersect: 'Through metaphor, a rhetorical means, and through ambivalence, a theoretical instrument, many things are in play in the same spot, transforming each spatial element into a volume where they intersect'. As a linguistic trope, the iceberg is suggestive of organizational silencing and the risks associated with speaking openly. It evokes unseen dangers obscured beneath the surface of organizational realities, the destructive effects of which can prove devastating. As such, its relevance at the time of writing, amid a global pandemic, is evident, where not only organizations but entire nations have been stopped in their tracks and 'shut down' by an invisible pestilence wreaking havoc with national health systems. This chapter provides a considered, reflective account of the iceberg-as-metaphor, in a bid to breathe new life into the discussion and improve its use in several ways: by recognizing the ambivalent endorsement the metaphor has garnered, by fostering an understanding of its openness and ambiguity and by illuminating present and past sensitivity to its limitations as a means of both 'seeing' and 'not seeing'. The iceberg draws attention to the layers beneath. As such, it attends to the necessity of plumbing those diverse emotions and politics that are often submerged, underlining the importance of pluralistic understanding, while warning of the danger of reifying assumptions.

In Chapter 5, Christiane Chihadeh explores the notion of historical consciousness in the production of critical historical studies, focusing on the relationship between the researcher, the practice of doing history and historical methods (Tennent et al., 2020). The subjectivity and reflexivity of the researcher, according to this viewpoint, are crucial. A critical realist approach that puts the emphasis on ontological foundations can encourage, she suggests, an emancipatory exploration of society and culture that enhances understanding of social issues. Informed by insights drawn from the work of Coraiola, Foster and Suddaby (2015), Chihadeh probes differing reconstructivist, constructivist and deconstructivist perspectives from history and the social sciences. Critical grounded theory is proposed as an apt methodology to operationalize historical research in a manner that expands interdisciplinary possibilities. Considered thus, archival ethnography illuminates the

notion of serendipity as an endless process of discovery that emphasizes the emancipatory potential of the data collection process itself.

The act of division which separates past from present in modern historiography is taken to task by Bastion, Foster and Coraiola (Chapter 6), who focus on the richness and relevance of Indigenous cultures, where the past is understood as the shared, dynamic product of ongoing relations. In such mnemonic cultures, ways of knowing and making sense of the world are passed down through the oral tradition from generation to generation by elders who serve as stewards of knowledge and past experience. The importance of oral history may lie 'not in its adherence to facts but rather in its divergence from them, where imagination, symbolism, desire break in' (Portelli, 1981: 100), in this way fostering a re-enchantment of society (Suddaby, Ganzin and Minkus, 2017). The dialogue with 'the other' (de Certeau, 1988: 3) that western rationality, underpinned by socially constructed assumptions of linearity and continuous progress, has traditionally suppressed and the 'historic turn' has largely bypassed is championed by this chapter. Indigenous organizations, these authors observe, are unique and culturally embedded. In embracing Indigenous worldviews, where the relationship with nature and the environment is paramount and which chime with principles of pluralistic understanding, historical organization studies has much to gain. The legacy of colonization and its associated trauma is an enduring one (Barros and Wanderley, 2020). Hearing the voices of those silenced and excluded over centuries of western hegemony, bereft of agency and legitimacy, engages a moral imperative.

Theoretical applications

In Part III of our volume, Ruel, Dyer and Mills explore the act of gendered remembering in the context of the Canadian space programme of the 1960s, Alouette, which saw the launch of Alouette I and II satellites into space (Chapter 7). These authors assume a postmodern approach in examining the discursive processes at play in an organizational history in which white men exercised almost exclusive voice compared with the women who participated in the missions but were effectively silenced. Through exploring antenarratives – 'prospective (future-oriented) ways of sensemaking' (Boje, 2008: 13) – the authors aim to surface gendered subtexts to tease out different aspects in a study of silences, including who is performing them and the emotions which underpin and support them. The tacit 'meta-rules' (Mills and Murgatroyd, 1991) that inform such silences are probed in the partial tales of female participants in the programme. These include the assumption that women lacked interest in science, and that they should leave employment to marry or have children (Durepos, McKinlay and Taylor, 2017); moreover, the grand narratives that told epic tales of scientific prowess were naturally masculine in orientation, which fed into wider systems of domination and exclusion, serving the status quo. To honour the women concerned, bringing them out of the shadows cast in the past for scrutiny in the present and future, their anonymity is foregone so that they are no longer forgotten and silenced. In western cultures, 'the group (or the individual) is

legitimized by what it excludes (this is the creation of its own space)' (de Certeau, 1988: 5). By conducting an important 'historical rescue and recovery' exercise, the authors enable the Alouette women to *reclaim* their space. They also bring to light a vital moral and social purpose in historical organization studies, furthering the development of feminist historiography that spotlights some inspirational women all too often ignored in received and hegemonic narratives.

Collection museums serve as microcosms whose guiding organizing principle is determined by the original collector-founder. Coman and Casey explore how the identity of a collection museum alters over time as well as to what degree it maintains ontological fealty to the collector-founder responsible for its genesis (Chapter 8). Drawing on emergent literature on collective memory (Halbwachs, 1950), organizational identity (Zundel, Holt and Popp, 2016), the discourse of history (Barthes, 1986) and institutional 'ghosts' (Orr, 2014), these authors examine how the identity of the founder comes to serve as a 'barometer' in the evolution of art history discourse, showing how founders' collection choices made many years previously are subsequently canonized. The empirical site of the research is the collection of Japanese ceramics assembled by American industrialist Charles Lang Freer (1854–1919), who legated his wide-ranging art collection to the Smithsonian Institution. In novel fashion, the chapter introduces a pioneering methodology that combines the use of archival methods commonly deployed in art history with social network analysis to contribute fresh insights on the interrelationships between the museum, its artefacts, the founder and the art markets in which they are located. The changing biographies of collections over time lead to 'afterlives' that are open to examination. It is the enmeshing of the founder's personal identity, perpetuated through institutional memory and storytelling, with the validation of seminal choices that results in her or his ongoing preservation in the museum's organizational identity.

Institutional entrepreneurship and the field of power are brought together by Maclean, Harvey and Suddaby, in Chapter 9, in their study of the creation of the global hotel industry in early-phase globalization – an example of collective agency in which Hilton played a formative part. Institutional researchers have largely failed to grapple with Bourdieu's (1996) construct of the field of power, despite its evident relevance for realizing a new organizational template. Drawing on rich archival data housed at the University of Houston, the chapter develops and refines understanding of the field of power in the context of institutional entrepreneurship. The field of power emerges not as a single, abstract entity, as it is commonly presented, but rather as intrinsically plural and highly differentiated, set within contrasting political milieus and jurisdictions in which Hilton strove to forge alliances with influential host-country elites (Maclean, Harvey and Press, 2006). These multidimensional *fields of power* were set apart not only by politics and governance regime but also by the alacrity with which they welcomed American business. The different temporalities which governed the opening of host-country hotels reflected the degrees of resistance and obstruction exhibited by local elites. The chapter also makes a methodological contribution. The rich historical case draws attention

to deep institutional structures, the consequences of which may only be discernible over a lengthy period, highlighting links and interrelations otherwise unnoticed in an ahistorical account (Braudel, 1980; Heracleous and Barrett, 2001). Companies are composed of constructions, layers of sedimentation (Clegg, 1981), often concealing change from the observer. Considering the development of the global hotel industry from a historical perspective sheds light on how it evolved and unfolded in the long run. The received idea that global capitalism grew out of the efforts of US corporate leaders intent on exporting the American model (Djelic, 1998) is revised, revealing a new model more attuned to local specificities.

The field of cultural production comes to the fore in Kerr and Robinson's socio-historical study of the creation of the new Scottish parliament, a vital symbol of emergent nationhood (Chapter 10). The authors add to the literature on historical organization studies by developing a historical relational analysis that embraces Bourdieu's (1993) historical sociology, introducing the notions of historical homology and historical affinity. The chapter highlights the importance of the field of cultural production in national identity formation, contributing to the rebirth of a former democracy. Enric Miralles, the parliament's Catalan architect, drew inspiration from Charles Rennie Mackintosh and the Glasgow School of designers, seeking to key the new building to the Edinburgh landscape not as a monument to hegemonic power but as fundamentally democratic in ethos, while distinctively Scottish. The past provided a resource to be exploited, such that ancient Scottish symbols and emblems, including saltires, crow-stepped gables and a knot garden, became refashioned in contemporary style (Harvey, Press et al., 2011). Imagining the nation or 'nationizing' reveals itself as an ongoing process of (re)interpreting the past in which actors from the cultural field – including poets and novelists, as well as politicians and architects – take centre stage.

In his best-selling book *The Path*, Konosuke Matsushita, the founder of Panasonic, writes that 'achieving the status of a professional … is not easy, and the effort required to maintain one's professionalism is likewise tremendous' (2010: 110). Sakai's chapter on the development of the nursing profession in Japan echoes this sentiment, chronicling the collective struggle of Japanese nurses over decades as they traversed the obstacle-strewn path to full professional recognition (Chapter 11). Sakai focuses on the interrelationship between institutional work and institutional outcomes from the 1880s to the present, charting an important shift in the nurses' relative power during this time. Drawing on archival data and interviews with nursing professionals, he shows how Japanese nurses, who at the outset of his study period were subordinate, low-status actors with limited capacity for agency, came to enjoy a relatively powerful position in Japanese healthcare. The changing power relations between nurses and doctors see the former expand their power to become recognized as critical partners of the latter. The chapter demonstrates the importance of adopting a wider understanding of agency and historical dynamics when studying institutional work. Writing during a worldwide pandemic, one can speculate whether nurses not only in Japan, but globally, might, alongside doctors, further expand the scope of their power in the future as the quintessential criticality of the tasks they

perform and our total dependence upon them demonstrate the significance and salience of their vulnerability and bravery before the ravages of a pandemic.

In the penultimate chapter (Chapter 12) featuring theoretical applications, Soulsby examines processes of re-legitimation and control in a former state-owned enterprise in the Czech Republic, exploring the role of stories and collective sensemaking in building shared understanding and managerial legitimacy (Maclean, Harvey and Chia, 2012b). The speed of transformation experienced by Central and East European societies and organizations after the fall of the Berlin Wall in 1989 was spectacular, generating organizational dissonance (Hollinshead and Maclean, 2007). An organization's past nevertheless forms an important strategic resource through which organizational history can be (re)packaged for different constituencies (Ooi, 2001). The case study company concerned in Soulsby's study, anonymized as Volnské Strojírny a Slévárny (Vols), was visited by the author on multiple occasions from 1991 to 2011. It is unusual in organization studies for a company to be observed ethnographically over such a long period. However, this sustained fieldwork affords a rare level of insight, enhancing the author's capacity for *Verstehen* or interpretive understanding of the post-communist society in question (Soulsby, 2004; Weber, 1947). Equally, it is rare in historical work for an organization to be anonymized, given the importance of verification, though in organization studies this is the norm. The need to preserve the firm's anonymity in this case derives from the longitudinal nature of the study, the author having given her word early in the process not to disclose its identity. Soulsby traces the evolving reputation of the finance director from organizational 'hero' to 'villain' according to the company's changing fortunes. In doing so, she highlights the importance of control of the 'official' history; the preservation of archives and artefacts and command of formal public documents emerging as critical to retaining control of the ongoing historical narrative.

The book concludes with a chapter written by the editors that reiterates the importance of dual integrity by considering two recent treatments of the East India Company. One is by the historian William Dalrymple, the other by the social scientist Stewart Clegg, who is also an editor of this book. The difference between analyses largely oriented either to conceptualization or narration of history is underscored, as is the usefulness of the historian's labour for the social scientists' craft. Maintaining the focus on dual integrity, a history of the present is sketched prior to consideration of a history of the future that the present pandemic may be shaping. It is one that in many respects may afford a radical disjuncture with past organizational practices, indicating possible contours defining the history of the future.

Conclusion

In writing this book, we strive to be a catalyst both for developing the field and building a community of scholars with a shared interest in enacting historical organization studies. We recommend a greater porosity of boundaries to embrace

varied ways of doing history in organization studies, as delineated above. Disciplinary boundaries are themselves 'artefacts of power' whose dominant paradigms resist redrawing to admit unorthodoxy and change (Steinmetz, 2007: 1). Interest in research combining theory with historical sources and methods is nevertheless plainly on the rise. The 'historic turn' can also be employed to generate a sense of belonging. Following its success as a political project, it is time, we suggest, to fulfil the promise of historical organization studies. The moment is now ripe to showcase what historical organization studies can contribute to research across a variety of domains, including strategy (Vaara and Lamberg, 2016; Suddaby et al., 2020), institutional entrepreneurship and institutional work (Mutch, 2007; Popp and Holt, 2013), organizational identity (Anteby and Molnár, 2012; Zundel et al., 2016) and Bourdieusian historical sociology (Harvey, Maclean et al., 2011; Harvey, Press et al., 2011). The chapters in this edited collection advance this agenda in several ways: First, as critical and theoretical research to extend and deepen what has already been accomplished; second, as empirically founded research with a theoretical focus. Further, as a collection, they help to map the terrain of this new direction in organizational research. Together, they demonstrate interdisciplinary breadth and intellectual curiosity (Holt and den Hond, 2013), aspiring to be 'analytical, creative, and bold' (Friedman and Jones, 2011: 1).

The narrative to this point suggests that history and organization studies have largely been separate worlds. This book moves beyond separate-world research to showcase reflexive empirical chapters on theorized history from both early career and more established scholars that exemplify historical organization studies in action, serving as an important landmark in the development of new directions. Our hope is that the studies it features will encourage other researchers of history and organization studies to get involved, to see how they might join and contribute to this stimulating agenda.

The front cover of this book shows the Tyne Bridge being built in Newcastle in 1928,[1] a bridge under construction, in the process of becoming, that was to become a prototype for the much larger Sydney Harbour Bridge, for which the steel was shipped from Middlesbrough in the north-east, by Dorman, Long & Co. Ltd. Our project, in many ways, began in Newcastle, where the four editors previously worked together and where, in June 2014, many authors featured in this volume gathered at the Association of Business Historians annual conference. We have been struck by just how appropriate the metaphor of the bridge is for our project of historical organization studies. Our project aims to bridge the gap between history and organization studies, bringing benefits to scholars from both disciplines. It seeks to suture together fragmented notions of past, present and future, in a process of becoming, mutually connected by the possibility of envisioning different potential futures. Bridges can sometimes be shrouded in fog or mist, like the haar that blows in off the North Sea, immortalized in Lindisfarne's 'fog on the Tyne', wholly or partially concealing their structure. We hope that this volume will provide a conceptual bridge that helps to bring some clarity to the

exciting project of historical organization studies, still under construction and in a process of becoming, on which we have collectively embarked.

Note

1 Courtesy of Tyne & Wear Archives & Museums.

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