

## GUEST EDITORIAL

Nurturing the  
historic turn

# Nurturing the historic turn: “history as theory” versus “history as method”

429

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### Abstract

**Purpose** – This paper aims to explore the turn in management and organization studies (MOS) and reflect on “history as theory” versus “history as method”.

**Design/methodology/approach** – Looking at previous research and the evolution of MOS, this paper situates the special issue papers in the current climate of this area of research.

**Findings** – The special issue papers included here each make a theoretical contribution to methodology in historical organization studies.

**Originality/value** – The eight articles featured in the special issue offer examples of innovative and historically sensitive methodology that, according to the authors, increase the management historian toolkit and ultimately enhance the methodological pluralism of historical organization studies as a field.

**Keywords** Historic turn, History as theory, History as method, Historiography

**Paper type** Editorial

### Introduction

Ever since Booth and Rowlinson (2006) proposed a “historic turn” in management and organization studies (MOS), scholars have increasingly recognized the importance of history to understand organizational life (Durepos and Mills, 2012; Rowlinson *et al.*, 2014; Bucheli and Wadhvani, 2014; Suddaby, 2016). Indeed, the historical discipline provides an alternative to the dominant science paradigms in organization studies (Zald, 1993; Kieser, 1994), so studies using a historical approach have the potential to inform various aspects of organization theory (Alvaro-Moya and Donzé, 2016; Söderlund and Lenfle, 2013; Suddaby, 2016; Maclean *et al.*, 2016). The past decade has witnessed the growth of a body of work on how, if at all, business historians can bridge the gap between the discipline of history and MOS (Rowlinson, *et al.*, 2014; De Jong *et al.*, 2015; Whittle and Wilson, 2015; Suddaby, 2016; Durepos, 2015). Scholarly discussions in this direction have developed along three broad dimensions. First, there is a debate on the feasibility of a historic turn in MOS, given the ostensible onto-epistemological differences between history and the social sciences (Rowlinson *et al.*, 2014; Coraiola *et al.*, 2015; Suddaby, 2016). Second, the scholars that do see potential for integration are theorizing the relationship between history and MOS



(Üsdiken and Kieser, 2004; Durepos and Mills, 2017a). Finally, on that basis, some scholars are seeking to identify the potential contributions of historical perspectives to MOS (Suddaby, 2016; Maclean *et al.*, 2016).

However, despite these efforts, it seems that the historic turn has not yet fulfilled its promise (Greenwood and Bernardi, 2014; Durepos and Mills, 2017a, 2017b). As business historians keep struggling with the identity of their discipline (Ponzoni and Boersma, 2011), the historic turn does not seem to engage successfully in a wholesale transformation of MOS. Indeed, most scholarly work seems to focus on “history as theory,” or on describing the role of history in MOS and its theoretical benefits. Although “history as theory” legitimizes scholars that seek to enrich MOS with historically grounded studies, it does not entail the actual conduct of historical analysis for purposes of theory building and testing. It seems that in order for the historic turn in MOS to fully realize its potential, scholars need to draw on the wealth of quantitative and qualitative historical organizational data that MOS scholars are currently neglecting (Maclean *et al.*, 2016; Mills *et al.*, 2016). The practice of integrating historical data collection and analysis into empirical strategies for performing theoretically motivated studies can be referred to as “history as method”. Unfortunately, recent attempts at empirically connecting history with MOS have borne limited theoretical fruit. Recent special issues published in leading business history journals (Mills *et al.*, 2016; Decker *et al.*, 2018) mainly contain work that confirms existing ideas about the role of history in management or apply theory for purposes of historical enrichment (instead of the inverse).

Through its wide applicability (Kipping and Üsdiken, 2015; McLaren *et al.*, 2015), the “history as method” approach allows for tremendous theoretical flexibility. Although methodological diversity could impede the progress of business history as a discipline (Álvaro-Moya and Donzé, 2016), it comes with potential, for example in terms of diversity of research questions and richness of historical knowledge (Decker *et al.*, 2015). Naturally, the use of history as a method invokes scrutiny of the techniques and practices of history that can be used in MOS (Suddaby, 2016). Since the call for a historic turn, a wide range of methods that business historians can draw upon has been examined (Decker *et al.*, 2015; Mills *et al.*, 2016). However, despite incisive attempts at organizing the methodologies available to business historians (most notably Rowlinson *et al.*, 2014), methodological discussions among business historians are ongoing (Durepos and Mills, 2017a) and don’t seem to have fully explored the variety and richness of the historical discipline relevant for MOS. We believe that advancing the methodological debate requires concrete work on generating what Decker *et al.* (2015) refer to as methodological pluralism.

The special issue of the *Journal of Management History* on “Uses of Methodology in Management History” contributes to enhancing the methodological pluralism of historical organization studies. Each in their own right, the eight papers showcase novel methodologies (Shaffner, Mills and Helms Mills; Tumble; Quelha and Costa), encourage us to think more broadly and creatively about existing methodologies and forms of historical data collection (Bowie; Tumble; Russell; Earnest) as well as introduce us to unique ways to combine methodologies (Ruel, Mills and Helms Mills; Olejniczak, Goto and Pikos) to yield insightful data and deeper contributions. We reserve a more thorough exploration of each special issue article for the last part of our introduction. In the next sections, we problematize the historic turn to offer context and rationale for the special issue theme and consequently the featured articles.

### **The call for a historic turn in management and organization studies**

Toward the end of the twentieth century, criticism emerged that scholars in the field of management and organization studies (MOS) had become too “scientific” in their approach

to organizational phenomena, focusing too strongly on scientifically verifiable, general models that were tested in highly controlled research contexts. As a result, the discipline had become “ahistorical”: cut off from historical context and configurations (Aldrich, 1999; Zald, 1993, 1996, 2002; Goldman, 1994; Kieser, 1994). According to the critics, the problem with the ahistorical approach was its tendency to yield “universalist” and “presentist” theory and empirics (Zald, 2002). Universalism refers to the view that contemporary theory applies to organizations across all societies and all times, while presentism alludes to research findings being reported as if they occurred in a decontextualized present (Booth and Rowlinson, 2006). Together, universalism and presentism lead to a narrow historical understanding of management as a static object rather than a dynamic phenomenon (Söderlund and Lenfle, 2013). Integral to the criticism was a call for MOS to become more engaged with history, as this would allow for more rigorous testing of organization theory, namely, against historical developments instead of short-term data (Kieser, 1994).

In the ensuing years, some scholars have taken a step further, arguing in favor of a “historic turn” in MOS (Booth and Rowlinson, 2006; Clark and Rowlinson, 2004; Rowlinson, 2013), which would represent a transformation of organization studies in at least three senses. First, it would entail a move away from the view that organization studies are part of the social sciences and thus questioning the scientific rhetoric of MOS. Second, it would involve a turn towards incorporating history as processes and context instead of as a mere variable. Third, it would encompass the engagement with historiographical debates on the epistemological status of narrative. An important motivation behind the call for a historic turn was that history had already been incorporated into various branches of organization theory, which would offer opportunities for historical perspectives to further organization theory (Clark and Rowlinson, 2004; Booth and Rowlinson, 2006). These branches include neo-institutionalism (Khurana, 2007) and evolutionary approaches such as population ecology (Hannan and Freeman, 1977) that analyze the development of organizations and organizational populations over time (Scott, 2001; Aldrich, 1999). Similarly, critical approaches to management, which draw on Marxist, Foucauldian, Weberian, post-colonialist and feminist theories, rely on the past to understand current management practices (Weatherbee *et al.*, 2012). More generally, the past is embedded in such concepts as “narratives” (Brown *et al.*, 2008) and “longitudinal study” (Delios and Ensigen, 2000).

### **The wake of the historic turn: “history as theory”**

The call for a historic turn has spawned a significant body of work that explores the usage of historically grounded research in the study of organizations and critically appraises both history and MOS (Rowlinson *et al.*, 2014; Bucheli and Wadhvani, 2014; Mills *et al.*, 2016; Suddaby, 2016). It consists of several dimensions in which different topics related to the historic turn are discussed. Here we identify three:

- (1) the feasibility of a historic turn;
- (2) theorization of the relationship between history and MOS; and
- (3) the potential contribution of historical perspectives to MOS.

Together, these dimensions can be characterized as “history as theory”: the study of the relationship between the historical discipline and MOS and of the way in which it can advance the latter field.

*Dimension 1: the feasibility of a historic turn*

The first dimension concerns the sheer feasibility of a historic turn in MOS. Several scholars have noted the intellectual disparity between the historical discipline and MOS (Clark and Rowlinson, 2004; Lorenz, 2011; Weatherbee, 2012; Rowlinson *et al.*, 2014; Suddaby, 2016), which would prevent business historians from contributing meaningfully to MOS with historical analyses. According to Suddaby (2016), there are two components to this disparity. The first is an ontological disagreement over what history is and how it is constituted. MOS commonly uses history based on the assumption that there is a knowable external past reality and that historical “truth” can be achieved through referential correspondence between historical “facts” and the past, where the past and history are synonymous (Weatherbee, 2012). However, historians attach different ontological status to “the past” and “history” (Jenkins, 1995) – while the former hints at reality, the latter forms a representation thereof (Van Maanen *et al.*, 2007).

The second element that Suddaby (2016) identifies is that there are epistemological differences between MOS scholars and historians. Rowlinson *et al.* (2014) identify three “dualisms”. The first relates to evidence, or what constitutes historical fact. While MOS scholars prefer data constructed from replicable procedures, historians derive narratives from eclectic but verifiable documentary sources. Second, the dualism of explanation pertains to how historical facts might be used to construct knowledge about the world. In MOS, historical facts are used to build and test theory, while the subjective, irrational and volatile nature of human behavior and the crucial role of perception – key foci in history – receive less attention (Weatherbee, 2012). Historians generally accept that convincing historical narratives may contradict each other, which troubles the communication between historians and social scientists (Passmore, 2011). Finally, the dualism of temporality refers to the treatment of time. In MOS, time is often abstracted as clock time (Pedriana, 2005) and matters only in terms of specifying the chronological order of events in processes (Abbott, 2001; Pierson, 2004). In history, time, in the form of dates, resonates in collective memories and represents a historical context (Dray, 1986; Tosh, 2008).

The ontological and epistemological divergences between MOS and history seem to have devolved to the methodological level (Jenkins, 1995; Suddaby, 2016), as methodological preferences have bifurcated toward deductive rationalism and inductive empiricism, respectively. That is, whereas management scholars emphasize theory and are critical of pure empiricism, historians emphasize empirical data and are highly skeptical of theory. According to Suddaby (2016), the extent to which the theoretical potential as identified by those who called for a historic turn in MOS will be realized hinges on the (in)ability of history and MOS to relax their ontological and epistemological assumptions. While “purist” takes on either discipline will most likely compromise the options for bridging the ontological and epistemological gaps between them, an agreement on the use of historical methods might be reached by scholars working at the disciplinary periphery. After all, it is in this intellectual space where the boundaries that define the subject matter of MOS and history are more inclusive, which may allow the members of these disciplines to transcend debates over the differences between “social facts” and “historical facts” (Hayek, 1943).

*Dimension 2: theorization of the connection between history and management and organization studies*

In line with Suddaby’s (2016) reasoning about the potential for collaboration between MOS and history, Durepos and Mills (2012) argue that to determine what value history can add to knowledge of organizations, one must be clear about what history exactly is and how it should be written. Achieving this clarity requires what these authors call a contemporary

theory of history. Such a theory can be formulated if one assumes that theoretical and methodological debates between historians and MOS scholars can lead to disciplinary convergence (Weatherbee, 2012). The second dimension of the historic turn literature has unfolded along these lines, theorizing the relationship between history and MOS. In particular, it discusses the identity of the field of business history and the theory, epistemology and methodology of the historical discipline in relation to MOS (Weatherbee, 2012; De Jong and Higgins, 2015; Mills *et al.*, 2016).

Business historians have developed different onto-epistemological positions that define how history can enrich MOS. For example, Üsdiken and Kieser (2004) identify three positions on the use of history in organization studies: the supplementarist, integrationist and reorientationist. First, the supplementarist position reflects the view that organizational studies are fundamentally a scientific, theory-driven enterprise in which attentiveness to history may help in variable selection and hypotheses generation (Goodman and Kruger, 1988) and ultimately in confirming and refining general theories (Lawrence, 1984). Second, the integrationist position argues for a fusion of social scientific data gathering with the interpretivist aspects of history (Zald, 1993, 1996) to identify where and how the latter's enriching potential can be activated. To realize this fusion, historians need to draw upon but also challenge the scientism of MOS, promoting links with humanist academic disciplines, such as literary theory and philosophy. This leads to the standpoint that although the development of organizational forms and arrangements is shaped by the past as a series of facts, these facts are represented through a contextualized mode of interpretation. Third, the reorientationist position is the most critical and challenges both the social scientific and ahistorical framing of MOS and the atheoretical character of much of historical analysis (Booth and Rowlinson, 2006). On that basis, it promotes a move of MOS away from its scientific aspirations (Carter, McKinlay and Rowlinson, 2002) and problematizes historical methods (Weatherbee *et al.*, 2012).

Similarly, Rowlinson (2004) outlines three historical perspectives in organization studies – factual, narrative and archaeo-genealogical. The factual perspective, roughly similar to Üsdiken and Kieser's (2004) supplementarist approach, views the practice of history as ultimately about uncovering facts. The narrative perspective resembles Üsdiken and Kieser's (2004) integrationist approach and suggests that the past in this perspective is about stories constructed around “traces” of the past, which are the raw materials of the historian's discourse rather than the events themselves' (White, 1987). Historical accounts in this perspective begin to problematize the past in MOS – a practice that is further pursued in Rowlinson's archaeo-genealogical perspective. This perspective arises out of the work of Foucault and focuses on the relationship between the present and the past, arguing that the present does not result from an inevitable series of events but rather from a discursive process that influences how events are read (Rostis, 2011). From this perspective it follows that there is an ontological and epistemological break between the present and the past, the latter being equally subject to discursively mediated understandings.

More recently, Durepos and Mills (2017a) have identified four co-existing and overlapping “phases” of work on the role of history in MOS: the factulist, contextual, methodological and ontological-epistemological phase. In the factulist phase, historical work is atheoretical and focuses on the discovery and reproduction of historical facts, (dis)confirming ahistorical organization theory (Leblebici and Sherer, 2008). The contextual phase echoes Kieser (1994) by providing comparative contexts for making sense of organizational phenomena. This type of analysis promotes understanding of contemporary organizations through their historical dimension. Approaches to history that belong to the methodological phase encourage reflection on the appropriate methods and styles of history

writing in MOS. For example, [Booth and Rowlinson \(2006\)](#) highlight several perspectives that can benefit historical methodology, such as narrative analysis and Foucauldian inspired research. Finally, the ontological-epistemological phase draws on the work of postmodern historians ([Bennett, 1987](#); [Jenkins, 1991](#)) and studies the nature of history and MOS and how they can be integrated. Most notably, [Suddaby \(2016\)](#) distinguishes between history as “text,” or manifest knowledge (i.e. “brute facts”) and history as “subtext,” or latent knowledge (i.e. a lens through which we view the present) and discusses three constructs that draw from the latter: ANTi-History, which analyzes the relational/organizational activities that go into the production of knowledge of the past ([Durepos, 2009](#)); rhetorical history, which studies the strategic use of historical discourse ([Suddaby et al., 2010](#)); and organizational legacy, which examines how historically shaped organizational or individual identities may drive competitive behavior ([Feldman and Romanelli, 2013](#)).

*Dimension 3: the potential contributions of history to management and organization studies*

The various “theorizations” of the relationship between history and MOS have enabled this group of scholars to formulate how the engagement with history, historical sources and historical methods can advance understanding of organizational phenomena. Typically, their contribution is formulated in more general terms. For example, [Álvaro-Moya and Donzé \(2016\)](#) argue that historical perspectives can shed new light on what companies, managers and governments know about the creation, development and transfer of organizational capabilities, the nature of innovation and entrepreneurship and the impact of institutional settings on firms’ competitiveness, among other issues. In addition, [Palmer et al. \(2007\)](#) contend that the embracement of history fosters the engagement in more generative discussions about new organizational forms, whereas [Cummings and Bridgman \(2011\)](#) maintain that doing history can contribute solutions to managerial problems.

Extending these arguments, [Söderlund and Lenfle \(2013\)](#) contend that because understanding of management is in perpetual development, there is reason to continually revisit the past. According to these authors, the iteration between past and present may actually be as important as the scientific processes of deduction and induction, because in it a particular kind of generalization can be found – one of rich stories and contextual understandings ([Gaddis, 2002](#)), filled with generalizable examples ([Flyvbjerg, 2006](#)). In turn, embedded generalizations may help scholars identify the interdependency of variables over time ([Jones and Khanna, 2006](#); [Bucheli and Wadhvani, 2014](#); [Quinn, 2015](#)). [Chandler’s \(1962\)](#) study of the emergence of the multi-divisional firm is just one example of how patterns can be identified in historical evolution. Based on their unique generalizability, historical accounts of corporate capitalism such as [Chandler’s \(1962\)](#) open up space for a broader debate about the role of the modern corporation in the current era of globalization in terms of economic growth, equality and democracy ([Booth and Rowlinson, 2006](#)).

Other scholars go beyond general formulations and suggest specific theories or concepts whose understanding might benefit from historical analysis. For example, [Suddaby \(2016\)](#) sees potential for contributions of history to institutional theory, which views organizations as the product of social rather than economic pressures ([Suddaby, 2013](#)). Institutional theory has an inherent historical component, because the meanings and values that organizations become infused with develop over time ([Selznick, 1949](#)). As [Suddaby \(2016\)](#) suggests, historians can enrich understanding of what institutions are and how they change because they can link institutional agency to unique and specific historical conditions. On that basis, historians might help resolve the paradox of embedded agency, which relates to the question of how actors can change the institutions that are supposed to shape their thoughts and actions ([Battilana and D’Aunno, 2009](#)). Other authors that target a specific theory are

Brunninge and Melander (2016), who argue that historical analysis may advance understanding of path dependency. The notion of path dependency is used in strategy to explain why firms are able to remain competitive in the face of market and industrial change. Path dependency exists where firms become locked-in onto a path of success (or failure) as a result of historical actions or decisions (Dobusch and Schüßler, 2012). According to Brunninge and Melander (2016), historical approaches allow scholars to study the interplay of self-reinforcing mechanisms at different levels of analysis.

Maclean *et al.* (2016) categorize the potential contributions to MOS of historical analysis based on four types of historical analysis: history as evaluating; history as explicating; history as conceptualizing; and history as narrating. Evaluative history confronts organization theory with historical evidence to test its explanatory power and identify limitations. This type of research can for example be used to test ecological theories (Hannan and Freeman, 1977) and aspects of the resource-based view of the firm (Wernerfelt, 1984), such as dynamic capabilities (Teece *et al.*, 1997) and path dependency (Sydow *et al.*, 2009). Explicatory history synthesizes theoretical ideas and historical evidence, fostering arguments based on reinterpretations of the past as well as theoretical refinements. For example, institutional theory benefits from historical perspectives (Suddaby *et al.*, 2014) that recognize the importance of institutional path dependence and adaptation (Leblebici *et al.*, 1991) in institutional agency. Historical approaches aimed at conceptualization use historical cases for inductive generalizations (Wadhvani and Jones, 2014). For example, Tushman and O'Reilly (1996) notion of strategic ambidexterity emerged from the observation that firms balance exploration and exploitation according to environmental conditions. Finally, history as narrating serves to explain significant organizational phenomena. Propositions and arguments emerge inductively from the historical evidence and exhibit a high level of context sensitivity (Lippmann and Aldrich, 2014). In Chandler's (1962) work, for example, a mass of case evidence is deployed to explain the spread of innovations such as multidivisional structures and diversification.

### **Dissatisfaction with the historic turn: exploring “history as method”**

Despite the identified potential of and the growing interest in the integration of history into MOS, the historic turn has arguably not yet fulfilled its promise (Durepos and Mills, 2017a, 2017b). First of all, the main streams of research that the historic turn has generated predominantly perform “history as theory,” as they focus on theorizing the role of history in MOS without actually making a theoretical contribution to practicing history. The ongoing theoretical debates about the use of historical approaches in MOS indicate that business history as a scientific discipline is still struggling with its identity (Ponzoni and Boersma, 2011). Beyond the ongoing navel-gazing of business historians, even where empirical attempts are made to connect history with MOS, the theoretical fruits of the historic turn seem to remain limited. This point can be illustrated with two recent and authoritative special issues on this topic. The first one was edited by Mills *et al.* (2016) and published in *Management and Organizational History* and explores the debates that have emerged from Booth and Rowlinson's (2006) initial call. The second special issue appeared in *Business History* and was edited by Decker *et al.* (2018) and attempts at reconciling history and MOS by focusing on “Historical Research on Institutional Change”.

Mills *et al.* (2016) use their special issue mainly to discuss the practice of history in and around organizations. For example, Corrigan (2016) reveals alternative performances of history in municipal budget-making practices and finds that municipal managers use history and traces of the past to develop durable images to unify actor-networks. Furthermore, Marshall and Novicevic (2016) use the historical case of Mound Bayou, an all

African-American venture in Mississippi, to problematize and reconstruct present conceptualizations of conformance activities for gaining legitimacy as a social enterprise. In addition, [Zundel et al. \(2016\)](#) review the advantages and problems of the use history as a resource for establishing and maintaining organizational identity claims and examine how using history impacts on the appreciation of history itself. Although these papers are effective at showing the importance of history in organizational life, theoretically they mainly reiterate [Suddaby's \(2016\)](#) argument that history has a “subtext” component. Therefore, the question that emerges from this special issue is how much theoretical ground can be broken, especially beyond the realm of institutional change, by focusing on the organizational use of history as opposed to history as a way to theorize behavior in and around organizations ([Durepos and Mills, 2017a](#)).

[Decker et al. \(2018\)](#) are also influenced by [Suddaby's \(2016\)](#) treatise and include papers in their special issue that address the tension between large-scale shifts of institutional logics and the unique individual and organizational practices that facilitate these shifts. For example, [Wadhvani \(2018\)](#) uses historical institutionalism to examine the co-evolution of legal and organizational change in US savings bank regulation. Furthermore, [Thompson \(2018\)](#) examines the evolution of “record pools” in the US music industry, which enabled disco DJs to access new music, through the lens of institutional work. Moreover, in his analysis of Finnish hypermarkets, [Seppälä \(2018\)](#) uses the concept of legitimacy as a tool to understand the adaptation of Finnish hypermarkets to evolving environmental pressures. What transpires from the papers in this special issue is that the editors have aimed to facilitate exploration of the opportunities of engaging with institutional theory for extending historiographical understanding of the past. However, from a MOS point of view, the contributions remain somewhat generic. Even if the papers invariably frame history by means of theoretical language, they are fundamentally historically motivated and perform history “for history’s sake”. Consequently, the theoretical contributions are formulated in a general way and thus enrich MOS to a limited extent only ([Kipping and Üsdiken, 2008](#)).

In light of the aforementioned special issues, what seems to be of key importance for the historic turn in MOS to mature is the realization that the practice of history affords access to a wealth of both quantitative and qualitative organizational data that might be drawn upon by means of several methodological approaches and methods for the building and testing of theoretical ideas ([Maclean et al., 2016](#); [Mills et al., 2016](#)). This idea can be summarized as “history as method”: drawing from what [Suddaby \(2016\)](#) refers to as the “text” component of history, where the “brute facts” are contained, historical practices of data collection and analysis can be integrated into empirical strategies for performing theoretically motivated studies. History as a method can be applied widely and thus allows for tremendous theoretical flexibility. Therefore, it enables business historians to further various debates in MOS ([Decker et al., 2015](#)). Indeed, historically grounded research has been performed in several management fields, including strategy, international business and entrepreneurship ([Kipping and Üsdiken, 2015](#); [McLaren et al., 2015](#)). Some scholars might caution that the approach to history as a method encourages the dilution of business history as a discipline, because communication across theoretical fields within MOS remains scarce ([Álvaro-Moya and Donzé, 2016](#)). However, it has also been argued that there is no prospect of a unified field of business history ([Rowlinson et al., 2014](#)), because historical theorists are suspicious of any attempt to impose paradigm consensus ([Van Maanen, 1995](#); [Megill, 2007](#)).

The quality of the theoretical contribution expected in MOS and the historical veracity required in historical research approaches place demands on researchers such that their analyses should demonstrate “dual integrity” or demonstrable competence in both disciplines ([Maclean et al., 2016](#)). Assuming that the ontological and epistemological



differences between history and MOS can be bridged, the requirement of dual integrity raises particular attention to techniques or practices of history (Suddaby, 2016). While promoting a historic turn in MOS, Booth and Rowlinson (2006) called for alternate methods of historically studying organizations beyond the traditional descriptive case study (Álvarez-Moya and Donzé, 2016). Since then, a wide range of theoretical framings, methodological approaches and methods has emerged that scholars can access to develop understandings of the past (Decker *et al.*, 2015; Mills *et al.*, 2016). Rowlinson *et al.* (2014) provide some methodological organization by identifying four archetypical types of historical analysis that are suitable for MOS. The first is corporate history, which consists of a holistic, objectivist narrative of a specific corporate entity. Second, analytically structured history narrates conceptually defined structures and events. Third, in serial history, replicable techniques are used to analyze repeatable facts. Finally, ethnographic history aims at recovering social practices and meanings from organizations.

Although Rowlinson *et al.*'s (2014) typology constitutes a major reference point for business historians seeking to contribute to MOS, historical methods, sources and narratives are never static (Weatherbee, 2012), and the discussion around the methodological choices that are available to study history in MOS is ongoing (Durepos and Mills, 2017a). We are therefore left with the question: to what extent are efforts to categorize historical methodologies effective at fully capturing the variety and richness that exists in the practice of history? In this light, it is understandable that Decker *et al.* (2015) call for a broader debate about the methods for business historical research that appreciates the diversity of approaches that have developed in the past decade. If this debate is to be given further shape, business history scholars have to work concretely on generating what Decker *et al.* (2015) refer to as methodological pluralism. Doing so not only encompasses proposing and discussing specific historical methodological approaches and methods that are suitable for MOS; it also requires demonstrating their use empirically in theoretically motivated studies.

### Introducing the papers

The papers featured in this special issue of the *Journal of Management History* each make a theoretical contribution to methodology in historical organization studies. Far from only describing the theoretical benefits of doing history ("history as theory") in MOS, the papers discuss and demonstrate how to integrate the practice of historical data collection and analysis to provide an empirical contribution ("history as method"). Thus, the papers illustrate the theoretical point through a full-blown empirical study that features respective methodologies.

The first two pieces in our special issue (Shaffner, Mills and Helms Mills; Ruel, Mills and Helms Mills) feature methodological contributions to enhance the historical study of gender and diversity in organizations. Heeding to calls to explore gender and diversity in organization studies, Shaffner *et al.* combine research on intersectionality with the study of the past to examine discriminatory patterns at work over time. After outlining the facets of intersectional history, the authors provide an example of the method in use which features Qantas Airways and their treatment of Australian Aboriginal people. Ruel *et al.* also focus on methodology to study discrimination and gender in organizations. Their context is the Cold War space industry where women are almost invisible because they were either employed in low organizational positions (which did not get documented and thus, do not make the archive repositories) or absent all together. The absence of women makes their study very challenging. Ruel *et al.* overcome this challenge by combining archival data featuring Pan American Airway's Guided Missile Range Division with an autoethnography featuring Ruel's experience within the contemporary space industry. This innovative

combination of two existing methodologies allows Ruel *et al.* to foster deeper insight into discrimination in the space industry. The outcome is a unique study that links the past and present in a non-chronological way to offer a fresh perspective on gender relations in the space industry.

The articles by Shaffner *et al.* and Ruel *et al.* are each influenced by postmodern historiography (Jenkins, 1991; Munslow, 1997) where knowledge of the past is viewed as socially constructed. This perspective is shared by Quelha and Costa, the authors of the third article featured in the special issue. Quelha and Costa perform a unique ANTi-History to trace the emergence and constitution of the Memorial Resistance of São Paulo. In doing so, they surface the socio-politics of the human and nonhuman actors involved in the site of memory. Far from the usual reliance on archival materials to study the past, this study combines data including interviews, videos, books, newspapers and websites to offer an alternative historical version that surfaces the complexity of the memorial's history.

Archives are often assumed to be the preferred choice of historians, with some going as far as performing full archival ethnographies (Decker, 2014; Coller *et al.*, 2016). The following three articles in the special issue (Bowie; Tumbé; Russell) each focus on the archive and its uses. The articles by Bowie and Tumbé focus specifically on newspaper archives. While Bowie praises them for their accuracy and cost-effectiveness and calls upon management historians to fully leverage their potential for contextualization, Tumbé demonstrates how the large-scale machine-readable texts ("corpus linguistics") available in digitized newspaper archives can be leveraged for analyzing the evolution of words, concepts and ideas across vast time periods and cultures, which in turn can lead to advancements in discourse analysis. The third paper, by Russell, is innovative in a different way, demonstrating how one can draw on extant sources that vary in form and periodization to provide coherent insights onto a phenomenon of interest. Russell uses three seemingly unrelated archives to paint the management experience in Canada from the 1960s to the 1980s. Despite the archives' divergent foci and the fact that their collections ostensibly offer little on the subject of the Canadian management experience, Russell finds sources in each of the three collections that allow him to shed light on the complexity of the management experience in post-World War II Canada. This analysis leads Russell to encourage management historians to be innovative in finding and using archival collections.

The last two articles featured in the special issue are empirically motivated case studies (Olejniczak, Tomasz and Pikos; Earnest) that offer theoretical insights for management historians. Olejniczak, Tomasz and Pikos' case study offers a multidisciplinary theoretical discussion of the concept of continuity, followed by its empirical illustration in a long-lived company, the Polish Jablkowski Brothers Department Store. The case study's featured organization offers an interesting context to study continuity because it has a discontinuous history. The authors capitalize on the longevity of the organization and its discontinuous history to offer insights on the notion of continuity in management history. From Poland, we travel south to Kosovo, the geographic context of Earnest's case study. In this special issue finale article, Earnest explores the multiple challenges of reconstruction and development in a war-torn Kosovo. The author focuses on the planning and implementation of projects while stressing the importance of historical, social and cultural contexts. This focus allows Earnest to outline the implications of project management practice and theory and show that international aid efforts do not always transfer easily to local community needs. Challenges identified include stakeholder communication, cost, quality and risk management. Earnest's case study demonstrates the need for more historically sensitive research on post-conflict communities and the insight they offer for modern project management knowledge.

Collectively, the eight articles featured in the special issue offer examples of innovative and historically sensitive methodology that we feel increase the management historian toolkit and ultimately enhance the methodological pluralism of historical organization studies as a field.

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