



JYVÄSKYLÄ UNIVERSITY
SCHOOL OF BUSINESS AND ECONOMICS

1st HiMOS virtual seminar: Historical methods in management and organization studies

Virtual Research Seminar Series @JSBE, 5th November 2020

Christian Stutz, Ph.D. (christian.Stutz@jyu.fi)

Zeerim Cheung, D.Sc. (Zeerim.1.cheung@jyu.fi)



Joining the collective efforts of historians and organization theorists

- “Historical organization studies” as a new methodological approach in organization studies

(Maclean et al., 2016; 2020; Godfrey et al., 2016; Kipping & Üsdiken, 2014; Wadhvani & Bucheli, 2014)

- / Development of various historical research strategies

(e.g., Decker et al., 2020; Maclean et al., 2016, Rowlinson et al., 2014; Vaara & Lamberg, 2016)

- / Refinement of basic historical methods

(e.g., Gill, Gill, & Roulet, 2018; Kipping et al., 2014; Stutz & Sachs, 2018; Wadhvani & Decker, 2018)

- / Impressive number of special issues (AMR, SMJ, OrgStudies, JBE, etc.)

- Yet, still relatively underutilized

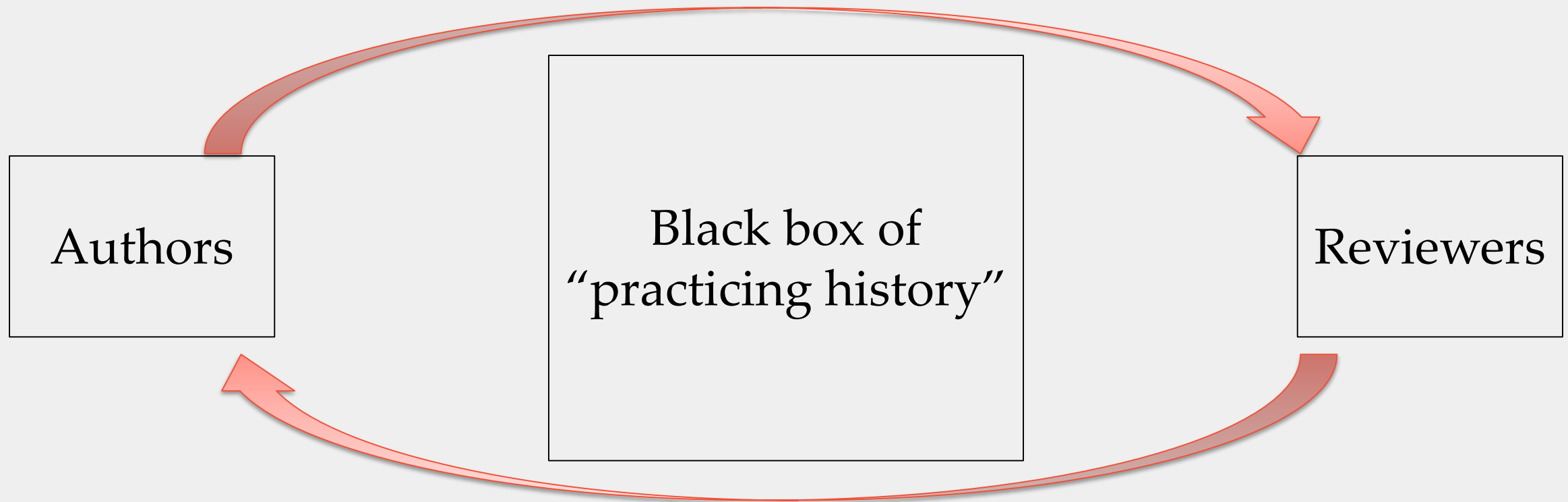
“Practicing” history still a black box—for authors and reviewers alike?

- Confusion around the various historical research strategies (e.g., distinctiveness and usefulness of different templates)
- Confusion around appropriateness of basic historical methods (e.g., source criticism, state of the narrative) for different historical research strategies



Noise and distortion in author-reviewer dialogue

Message (noise): e.g, “historical dilettantism” (Maclean et al., 2016)



(distorted) feedback: e.g., exogenous “political” critique

(Ketokivi & Mantere, 2010)

Inspiration: Patriotta, 2017

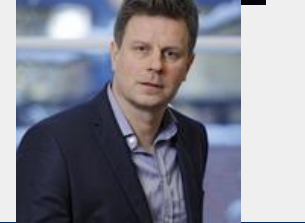


Workshop's purpose

- Building and advancing practical knowledge of doing history
- Appreciation of the variety of approaches

Today!

Presenter	Work
Ryan Raffaelli , Harvard Business School	Keynote: Theory Induction Using Historical and Qualitative Data: 'Technology Reemergence' and the Swiss Watch Industry
Alexi Niittymies , Tampere University (with Kalle Pajunen and Juha-Antti Lamberg)	Capturing Temporal Embeddedness in International Business Research: Three Historical Approaches
Stephanie Decker , University of Bristol (with Elena Giovannoni and Emmanuella Plakoyiannaki)	Building Identity: Architextual Resources in the Identity Formation of the Bauhaus
Santi Furnari , The Business School, City, University of London	Unobtrusive action: Activating latent biographical contradictions in centralized organizations



Discussion is chaired by **Juha-Antti Lamberg** (JSBE)



Agenda

Time (Finland)	Slot
16.00-16.05	<i>Intro</i>
16.05-17.00	Ryan's keynote and Q&A
	<i>5 min. transition break</i>
17.05-17.40	Aleksi's presentation and discussion
	<i>5 min. transition break</i>
17.45-18.20	Stephanie's presentation and discussion
	<i>5 min. transition break</i>
18.25-19.00	Santi's presentation and discussion
	<i>Outlook</i>



Etiquette

- Some useful principles
 - / Default setting: Muted
 - / Use chatbox to announce your question/comment
 - / The chair allows you to elaborate on your question/comment
- Let's see how it goes!



JYVÄSKYLÄ UNIVERSITY
SCHOOL OF BUSINESS AND ECONOMICS

Outlook





Outlook!

- Next HiMOS virtual seminar in spring 2021
 - / Keynote: **Eero Vaara** (Saïd Oxford): “How to learn from unusual organizations?”
 - Call for papers is open!



JYVÄSKYLÄ UNIVERSITY
SCHOOL OF BUSINESS AND ECONOMICS

Appendix





Some typical comments historical papers receive

- 1) Usefulness and problems of positioning empirical manuscripts in relation to methodological “templates” (e.g., Rowlinson et al.’s analytical-structured history or Maclean et al.’s conceptualizing approach to history)
- 2) Theoretical framing of historical research setting: For instance, is the way the empirical setting is framed appropriate (e.g., logic of purposive sampling; sensitivity to historical specificities)?
- 3) Empirical material: To what extent is the empirical material appropriate to address the research problem (e.g., role of historical source criticism and triangulation)?
- 4) Analysis/understanding: Are the analytical assumptions and procedures sufficiently clear? Have you (as a reader) confidence in the researchers’ interpretation (e.g., sufficiently grounded in evidence; questions of historical veracity)? What kind of explanation is used (e.g., historical periodization; conceptual lenses)?
- 5) Contribution: To what extent do findings map into extant literature (historiographical work, organization theory literature), and sufficiently extend and/or challenge previous work?

Source and inspiration for questions: Gill, Gill, & Roulet, 2017; Patriotta, 2017; Wadhvani & Decker, 2018; own reviews



Maclean et al.'s (2016) typology

		PURPOSE	
		Exposition	Interpretation
M O D E	Social Scientific	Evaluating Theory testing	Explicating Applying theory to reveal the operation of transformative social processes
	Narrative	Conceptualizing Theory development and refinement	Narrating Explaining the form and origins of significant contemporary phenomena

Purpose:

- “Exposition of theoretical ideas” to contribute to theoretical knowledge
- “History as interpretation” to contribute to historical knowledge

Mode of enquiry:

- Social scientific: formal scientific procedures
- Narrative form: “inexact” procedures

→ 2x2 matrix reveals **four alternative strategies** to historical research

Rowlinson et al.'s (2014) typology



	Corporate history	Analytically-structured history	Serial history	Ethnographic history
Description	Consisting of a holistic, objectivist narrative of a corporate entity	Narrating theoretically conceptualized structures and events	Using replicable techniques to analyze repeatable facts	Reading documentary sources “against the grain” to recover practices and meanings from organizations
Explanation	Narrative (corporate entity)	Narrative (conceptual construct)	Analysis (e.g., deductive hypotheses testing)	Analysis (e.g., abductive reasoning)
Evidence	Sources	Sources	Data	Sources
Temporality	Periodization	Periodization	Chronology	Periodization
(Assumed) relation to Maclean et al.'s typology	None	History as conceptualizing	History as evaluating	History as narrating/history as conceptualizing

Vaara & Lamberg's (2016) approaches



	Realist history	Interpretive history	Poststructuralist history
Onto-epistemological basis	Historical realism: usually reflects scientific realism	Social constructionism and interpretive traditions in history	Radical social constructivism and poststructuralism
Methodological characteristics	Focus on accurate and authentic representation of historical events and processes	Focus on actions and meaning; author reflexivity	Problematization of historical truths; criticality as a general methodological feature
Exemplary method	Comparative historical analysis: Using historical material to identify more general patterns (processes, mechanisms, causalities)	Microhistory: "Understanding" the meaning of the events in questions in historical context	Genealogy: Emancipatory knowledge interest in regard to understanding the historical evolution of specific discourses and their truth effects
Comparability	Maclean et al.'s history as conceptualizing (yet, alternative onto-epistemological assumptions possible) Rowlinson et al.'s analytically	Maclean et al.'s history as narrating Rowlinson et al.'s ethnographic history	None

Wadhvani et al.'s (2020) overview of traditions of historical writing and their usefulness for the entrepreneurship context



JSBE

TABLE 1 Historical approaches to entrepreneurship research

Approach	Socio-economic history	Cultural history	Microhistory	Comparative history	Historical case studies
Exemplar	Ruef	Demil	Hollow	Godley and Hamilton	Toms, Wilson, and Wright
Sources	Census data	Industry/firm records	Personal letters	Data; Oral histories	Published sources
Interpretation	Variable-based	Processual	Emergent	Processual	Variable-based
Assumption @ Sensemaking	Universal	Situated	Situated	Situated, universal	Universal
Causation	Test	Narrative	Narrative	Comparison	Comparison
Main contribution	Household and labor market institutions determine the propensity to own firms because they shape entrepreneurs' ability to control the work of others.	Administrative categories demonstrate the role of the state in shaping entrepreneurial opportunities, in particular by making counting possible.	Evolving socio-materiality of entrepreneurial networks; co-evolution of social movements and entrepreneurial networks; dialogical construction of contexts within networks.	Collective memories shape entrepreneurial perceptions of uncertainty and play a role in their propensity to engage in strategic alliance formation.	Product market innovation interacts with the quality of financial intermediation to determine the scope of entrepreneurial opportunities in a historical setting.
Other research applications	Variations over time in the relationship between entrepreneurial activity and (1) social structures and affiliations. (2) The resource environment. (3) Legal forms of organization. (4) Patterns of agglomeration.	(1) Studies of complex multilevel social processes. (2) Antecedents, contexts, and consequences of cultural entrepreneurship. (3) Conceptual and critical histories of entrepreneurial constructs.	(1) Studies of sensemaking and effectuation. (2) Research on the emergence of routines. (3) Studies of entrepreneurial practices and artifacts. (4) Entrepreneurial uses of history.	(1) Studies of complex multilevel social processes, (2) Studies of how entrepreneurs perceive and grapple with uncertainty.	(1) Studies of the causes of opportunities. (2) Theory development of new or emerging phenomenon.



References I

- Decker, S., Rowlinson, M., & Hassard, J. 2020. Rethinking history and memory in organization studies: The case for historiographical reflexivity. *Human Relations*, 1–50.
- Gill, M. J., Gill, D. J., & Roulet, T. J. 2018. Constructing trustworthy historical narratives: Criteria, principles and techniques. *British Journal of Management*, 29(1): 191–205.
- Ketokivi, M., & Mantere, S. 2010. Two strategies for inductive reasoning in organizational research. *Academy of Management Review*, 35(2): 315–333.
- Kipping, M., & Üsdiken, B. 2014. History in organization and management theory: More than meets the eye. *Academy of Management Annals*, 8(1): 1–83.
- Kipping, M., Wadhvani, R. D., & Bucheli, M. 2014. Analyzing and interpreting historical sources: A basic methodology. In M. Bucheli & R. D. Wadhvani (Eds.), *Organizations in time: History, theory, methods* (pp. 305–325). Oxford, England: Oxford University Press.
- Maclean, M., Clegg, S. R., Suddaby, R., & Harvey, C. 2020. *Historical organization studies: Theory and applications*. Oxon, UK: Routledge.



References II

- Maclean, M., Harvey, C., & Clegg, S. R. 2016. Conceptualizing historical organization studies. *Academy of Management Review*, 41(4): 609–632.
- Patriotta, G. 2017. Crafting papers for publication: Novelty and convention in academic writing. *Journal of Management Studies*, 54(5): 747–759.
- Rowlinson, M., Hassard, J., & Decker, S. 2014. Research strategies for organizational history: A dialogue between historical theory and organization theory. *Academy of Management Review*, 39(3): 250–274.
- Stutz, C., & Sachs, S. 2018. Facing the normative challenges: The potential of reflexive historical research. *Business & Society*, 57(1): 98–130.
- Vaara, E., & Lamberg, J.-A. 2016. Taking historical embeddedness seriously: Three historical approaches to advance strategy process and practice research. *Academy of Management Review*, 41(4): 633–657.
- Wadhvani, R. D., & Bucheli, M. 2014. The future of the past in management and organization studies. In M. Bucheli & R. D. Wadhvani (Eds.), *Organizations in time: History, theory, methods* (pp. 3–32). Oxford, England: Oxford University Press.
- Wadhvani, R. D., & Decker, S. 2018. Clio's toolkit: The practice of historical methods in organization studies. In R. Mir & S. Jain (Eds.), *The Routledge Companion to Qualitative Research in Organization Studies* (pp. 113–127). New York, NY: Routledge Companions.
- Wadhvani, R. D., Kirsch, D., Welter, F., Gartner, W., & Jones, G. 2020. Context, time, and change: Historical approaches to entrepreneurship research. *Strategic Entrepreneurship Journal*.