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Organization Theory in Business and Management History:
Present Status and Future Prospects

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Abstract

A common lament is that business history has been marginalized within mainstream business and management research. We propose that remedy lies in part with more extensive engagement with organization theory. We illustrate our argument by exploring the potentialities for business history of three cognitive frameworks: institutional entrepreneurship, evolutionary theory and Bourdieusian social theory. Exhibiting a higher level of theoretical fluency might enable business historians to accrue scholarly capital within the business and management field by producing theoretically informed historical discourse; demonstrating the potential of business history to extend theory, generate constructs and elucidate complexities in unfolding relationships, situations and events.

Business history has long been critiqued as lacking engagement with mainstream debates in

business and management research. An overall criticism is that it eschews the "big questions"

of substance and consequence in social scientific research, implying that the field is

somewhat introspective, overly narrow and rather fragmented, thus neglecting numerous

themes and issues within the broad natural purview of the field.[1] Two related problems have

been identified that have limited the appeal of business history and its accessibility to

management and organization scholars. First, there is a lack of generalizability of its findings.

Narratives tend to be very particular in relation to firms, locations and time periods,

emphasizing uniqueness; such that "it is not clear that historical settings, fine veined and

particular as they may be, ever repeat themselves".[2] Second, there is a lack of engagement with theory. This stems in part, according to Scott Taylor, Emma Bell and Bill Cooke, from business history's own disinclination to specify the foundational but "hidden epistemological (and therefore theoretical) position" that underlies the historiographical operation.[3] These scholars are not alone in implying that business historians are to some degree the authors of their own marginalization in the wider field of management research; reluctant to grapple with and often dismissive of relevant conceptual lenses, failing to contribute significantly to interdisciplinary conversations, and seemingly preferring their own "solitude" to meaningful interaction with organization theory.[4]

These deficiencies have long been recognized within the business history community itself. Business historians have lamented the lack of expertise in harnessing the power of theory, too often appearing as "fact-mongers without theory", and of the consequent need to blend theory and history together to produce more incisive research.[5] It is increasingly acknowledged that complex, detailed, book-length studies, while still prized in history departments, may not always be the best outlets to amplify business history research and engage more broadly with the business and management scholarly community, which increasingly privileges journal articles.[6] While business historians have found homes in different types of schools and departments in different countries, including history in the US and economics in Japan, many are based in Business Schools, especially in the UK, whose league table positions are partly determined by the rankings of journals in which their researchers publish. Allied to this is greater cognizance that the field, as it currently stands, exhibits a continued lack of reflexivity, maturity and sophistication with regard to methodologies.[7] Methodological transparency is increasingly necessary for both interdisciplinary dialogue and scholarly legitimacy, as well as for publication in the top management journals that the present preoccupation with Business School rankings demands.

There is greater willingness to recognize the requirement to broaden business history's cross-disciplinary appeal through more internationally comparative research that is "analytical, creative, and bold", embracing other geographies.[8] This is accompanied by increasing awareness that the field has been contorted by a preponderance of American corporate ideas, assumptions, business models and practices, promoting Western-style rationality and "narrative imperialism".[9] This has arguably discouraged ethnic diversity.[10] It may also have limited engagement with "the other".[11] These alleged failings, along with proposed solutions, are articulated in Table 1. In short, there is a growing consensus among many business historians of the need to move with the times, *tempori parendum*.

Those writers who have explored avenues for a fruitful synthesis between history and management research have tended to do so *largely from the perspective of the latter rather than the former*.[12] In other words, their primary concern is what history can bring to organization studies; far less frequently are they concerned with the converse, how organization theory can enrich business history. Herein lies the purpose of the present paper. We advance the proposition that business history should "come in from the cold" to play a more central role within the mainstream of business and management research. To do this, we suggest, demands higher levels of *theoretical fluency* in business history research, command of an appropriate conceptual language, than are presently found in most business history publications. [13] We illustrate this argument with particular reference to the potentialities for fruitful engagement with organization theory, much of which is germane to business and management history. We follow Haridimos Tsoukas and Christian Knudsen in defining organization theory here simply as "the academic field specializing in the study of organizational phenomena (both micro and macro)".[14] Greater engagement with organization theory might benefit the field by demonstrating the potential of business history research to explain the past and illuminate the present, highlighting both continuities and discontinuities

in long-term organizational and institutional trajectories while simultaneously embracing a "forward-looking perspective" that harnesses "'futures past'… different pasts to address present concerns and to highlight future possibilities".[15]

In progressing our argument, we pose three principal questions. First, why do business and management academics typically prize theory development as integral to their research? Second, what can organization theory contribute to business historians, and which cognitive frameworks might lend themselves to application in business history research, helping business historians to theorize their accounts? Finally, what precisely is needed if business historians are to benefit from increased engagement with organization theory and thereby increase the reach and impact of their research?

Our paper is structured as follows. In the next section, we explain why theory, theorization and theoretical development take centre stage in business and management research, highlighting some of the ways which organization theory can illuminate business history research. We next seek to demonstrate the potential for business historians to engage fruitfully with organization theory, in ways that enable theory to illuminate and explain the past, with the rich data of business history helping to refine existing theoretical ideas as well as to develop new ones. We illustrate our argument with reference to three established bodies of organizational theory: institutional entrepreneurship, evolutionary theory and Bourdieusian social theory. In our final main section, we examine more closely the requirements for extensive engagement with theory in business history research. In particular, we consider five key principles of historical organization studies – *dual integrity*, *pluralistic understanding*, *representational truth*, *context sensitivity*, and *theoretical fluency* – that make for a better, more seamless interplay between history and organization theory, doing so from a business historical perspective.[16] We conclude by discussing the benefits to business history and its

practitioners of greater alignment of agendas and practices with the mainstream of business and management research.

[Insert Table 1 about here]

Theory in Business and Management Research

The growing consensus on the part of business historians of the need to move with the times has been aided in recent years by the advent of a "historic turn" in business and management research, characterized by increasing attention to longitudinal studies and historical contexts.[17] This historic turn was prompted by a recognition among management researchers that organizational research was too often relatively timeless and ahistorical, failing to engage sufficiently with history and hence adequately to capture and reflect the rich "historicity of organizational life".[18] This move towards a historic turn has now gathered fresh momentum, recent research having played a key role in invigorating the discussion; prompting renewed calls for a *rapprochement* between the two disciplines.[19] Michael Rowlinson, John Hassard and Stephanie Decker emphasize three salient epistemological dualisms that need to be overcome if meaningful interaction between organization studies and traditional narrative history is to ensue. [20] These dualisms relate to explanation, evidence and temporality. The authors observe that management research promotes analysis over narration, self-generated data above the discovery of documentary evidence, and chronological or calendar time in preference to periodization. Similarly, Matthias Kipping and Behlül Üsdiken propose three ways in which history might embrace organization theory at various levels of analysis: namely as a way of testing theory (called "history *to* theory"); of permeating theoretical perspectives ("history *in* theory"), and as a way of embedding historical complexity within the theorization exercise *per se* ("historical cognizance").

Mairi Maclean, Charles Harvey and Stewart Clegg take further the notion of developing a creative synthesis between history and organization studies in conceptualizing

historical organization studies.[21] Historical organization studies incorporates historical data, methods and knowledge, situating organizing and organizations within their socio-historical contexts to engender historically informed theoretical narratives mindful of both disciplines; sensitive to evolving interpretations over time and the sedimentation of pre-existing patterns. Building on extant research, these authors suggest a typology of four distinct conceptions of history in organizational research: history as evaluating (testing and refining existing theory), history as explicating (applying and developing theory to reveal the operation of transformative social processes), history as conceptualizing (generating new theoretical constructs), and history as narrating (explaining the form and origins of significant contemporary phenomena).

A recent noteworthy volume edited by Marcelo Bucheli and Daniel Wadhwani likewise advances the use of historical methods and reasoning in organizational research.[22] Importantly, this urges a historical perspective which demands "new ways of *acting* and not just new ways of *thinking*". As Bucheli and Wadhwani insist, for the historic turn to realize its full promise requires that business historians are prepared to re-evaluate and re-orient their own institutionalized practices with greater intellectual boldness than they have displayed thus far, seizing the conspicuous opportunities that the historic turn in management research has indubitably provided. Yet despite the recent flurry of scholarly activity around this notion of a historic turn, business history research arguably remains cast in the classical mould of historical enquiry in which empirical research is valued mainly for its own sake, irrespective of audience size or whether or not it contributes to a collective, thematic endeavour. Reaching out to address the interests and concerns of a much wider constituency of potential readers might result in the "bigger tent" highlighted by Donald Hambrick as necessary to enhance scholarly impact, while helping to re-engage the field at the centre of broader economic, social, political and cultural discourses and movements.[23]

Business history has been defined by Mira Wilkins as a subject concerned with "the study of the growth and development of business as an institution".[24] As such it pertains, as Daniel Raff observes, to "firms in an essential way: what happens among firms, and what happens within firms".[25] In analogous fashion, Gerald Davis clarifies organization theory as being "broadly concerned with organizations and organizing, with a particular (but not exclusive) emphasis on organizations as distinct, countable units of analysis".[26] Davis emphasizes the importance of periodization, pointing out that "empirical generalizations that are true during one period may be false in a different period"; he therefore encourages attentiveness to temporality, calling for "carefully done research that yields insights into particular processes at particular times".[27] It is clear from these interrelated definitions that the two disciplines share much common ground. A conceptual interplay between the two would seem therefore to hold considerable promise.

Theory in business and management research, according to Hambrick, concerns the quest for explanation.[28] Theory aids the organization of thought processes, the articulation of cogent arguments, leading to improved projections, thereby enhancing comprehension. While business historians weave explanation into their narrative accounts so as to enhance understanding, organization scholars typically seek an explanatory theory as a point of departure for empirical studies.[29] Thus there is an inherent tension between narrative accounts whose character is primarily interpretive; and evaluative, theoretically informed accounts concerned with exposition.[30] Hüseyin Leblebici describes these contrasting approaches as follows: management researchers view theory as paramount "in order to select relevant facts, to search for generalizable causal mechanisms, to accumulate evidence… and to ultimately test theories and generate better theories".[31] Business historians conversely "have their own explanatory theories even though these theories are expressed implicitly. The narrative form of the organizational historian is in a sense a form of theoretical explanation".[32] Paul Ricoeur

regards the apparent dichotomy between explanation and understanding as intrinsically false, insisting that these are not mutually exclusive but rather "relative moments in a complex process called interpretation".[33] Nonetheless, it is important to clarify that business history research is not devoid of theory. The search for "patterns (for continuities and discontinuities) in the development of enterprise" advocated by Wilkins contains the rudiments of theory building. [34] It therefore facilitates new ways of seeing that enable researchers to "see things together" in order to link particular situations and contexts and thereby to discern the bigger picture.[35] Indeed, it is precisely because business history is not atheoretical but encompasses the foundations of theory that a fruitful dialogue with organization theory has such potential.

The work of Alfred Chandler is emblematic in this regard; his *oeuvre* proving generative, indicative of business history's conceptual potential. Chandler fashioned constructs in each of his three master works that were influential in shaping research agendas within business and management, through which he elucidated the emergence of managerial capitalism.[36] In inductively deriving the proposition that structure follows strategy, with which he explained the growth of multi-divisional enterprises, Chandler combined interpretation with an analytical framework.[37] His research embraced corporate, sectoral and international comparisons.[38] Chandler's work has been criticized by some commentators for its apparent universalism, ignoring the fact that managerial revolutions assume varying forms.[39] It has also been critiqued for its alleged unidirectional irreversibility of time, whereby "chains of cause and effect proceed in a path-dependent fashion".[40] His work nevertheless injected the impetus to generalization the discipline required.[41] Moreover, setting it in context, in "the broad sweep of a history… both complex and still unfolding", arguably casts it in a new light, inviting reconceptualization.[42] Similarly, in his work on international business, Geoffrey Jones has been instrumental in promoting the international reach of business history research in a globalizing world in a way that embraces wide-ranging

methodological approaches.[43] Together with Walter Friedman, Jones has advocated not only "dissension and debate" in unsettling assumptions but also an agenda that involves "the construction of broad frameworks".[44] Given that management theory has been charged with failing to reflect the rich diversity of organizations in society, and given that about two-thirds of management research is estimated to be embedded in theories imported from other disciplines (as for example in population ecology and evolutionary theory), pursuit of the theoretical intersection between the two disciplines makes considerable sense. [45] If indigenous theory is to be generated, Roy Suddaby suggests, it is most likely to emerge from the domain of business history.[46]

We contend that the reasons why business and management scholars prize organization theory, as outlined above, are also relevant to business historians. Studying a phenomenon through a given cognitive lens can generate new cross-disciplinary conversations that span disciplinary boundaries. Recasting an event in a different conceptual light can trigger fresh insights that in turn challenge received views, casting the empirical terrain in a new perspective. Temporal-theoretical perspectives originating in one historical setting may be applied to other research contexts, improving understanding. Adoption of a theoretical lens stemming from organization theory can yield new comparative perspectives that might otherwise go unobserved, emphasizing links with similar studies to clarify the "bigger picture" by stretching timeframes and expanding geographies, helping researchers to distinguish relations and processes diachronically.[47] As Stephen Lippmann and Howard Aldrich put it, "when researchers make more direct connections between their cases and other, similar cases, they strengthen the findings of business historians and others interested in historical organization studies".[48]

One question that arises is whether business historians actually see any purpose in searching for connections, seeking comparisons, analogies and emerging patterns or whether

they prefer instead to focus on particularities and the unique aspects of events and situations? However, we are not advocating a blueprint here that can be universally applied but rather *more and better sensemaking*. Making connections between cases in this way is also a means of finding a pathway through them. As Tony Judt observes, "There are lots and lots of paths, real and potential, marked and unmarked, through this forest. The past is full of stuff. But if you don't have a path through it, you stare at the ground, you search for footing, you can't appreciate the trees".[49] Given the constraints of a journal article not all the opportunities that are possible can be explored. In what follows, we briefly suggest possible pathways drawn from organization theory that business historians might consider following, before alighting on three that hold particular promise in helping business historians to theorize their accounts: namely, institutional entrepreneurship, evolutionary theory, and Bourdieusian social theory.

Organization Theory and Business History

Numerous theoretical strands within organization studies contain a historical dynamic that resonates with business history. Organizational theories sensitive to the fundamental historicity of experience that promote a longitudinal approach include path dependence and associated theories encompassing structural inertia and imprinting.[50] Theory pertaining to the resource based view of the firm and dynamic capabilities similarly strike a chord with historical research, alongside organizational ecology and organizational emergence.[51] Historians have been drawn to institutional theory and historical institutionalism.[52] Postmodernist and Foucauldian perspectives on genealogy have proved attractive, alongside organizational memory, entrepreneurship, process theory, strategic change and strategy as practice.[53] Sensemaking, storytelling and discourse analysis likewise lend themselves to a business historical approach.[54]

Space does not permit us to explore each of these organizational frameworks at this juncture; and in numerous cases other commentators have already highlighted their power to

illuminate business history; providing robust exemplars of studies where the historical topic under scrutiny furnishes a springboard for theorization, both theory and topic elucidating the other on a reciprocal basis. A useful example is given by Andrew Popp and Robin Holt's study of historical entrepreneurship in nineteenth-century India, conducted through examination of personal letters written by the founders of a Calcutta merchant house, which presents entrepreneurial behaviour as integral to and inseparable from the historical specificities of the times in which it was enacted.[55] Here we focus instead on three cognitive lenses drawn from organization theory, whose usage in business history we believe could be advantageously expanded, contributing to more meaningful encounters with historical data.

Institutional entrepreneurship, a concept first coined by Paul DiMaggio in the 1980s, was conceived as a means of bringing endogenous agency back into the study of institutional change.[56] Institutional entrepreneurship focuses on the fundamental role played by prominent individuals in reconfiguring institutional landscapes in their favour by incorporating their own interests within the ensuing institution.[57] We adopt Royston Greenwood and Roy Suddaby's definition of an institutional entrepreneur as an actor who imagines and seeks to create "new institutions as a means of advancing interests they value highly".[58] Business history is sometimes critiqued for concentrating too overtly on the lives of great men (and they are usually men) whose stories are deemed worth recording and to whom the bulk of "ego documents" relate – documents that give "an account of, or privileged information about, the 'self' who produced it".[59] In this way the activities of business leaders are privileged over those of ordinary individuals, undemocratically silenced in comparison.[60] However, institutional entrepreneurship arguably provides an opportunity for business historians to turn this to their advantage, since as Leblebici et al. insist: "only institutional entrepreneurs, who are organized and possess sufficient resources, are capable of introducing institutional change".[61] According to Kamal Munir and Nelson Phillips, however,

institutional theory lacks a coherent explanation for precisely how such actors achieve institutional change aligned to their own interests, inviting contributions from scholars with a grasp of historical detail and an accompanying interest in conceptualization.[62] Moreover, as the work of Douglass North amply illustrates, institutional change is by its nature a protracted process that occurs over a long time frame.[63] Business historians are therefore well placed to make a significant contribution to this vibrant research agenda while making explicit its "assumptive historical dynamic that goes beyond mere temporality and which, largely, remains unarticulated".[64]

In their paper on Andrew Carnegie and his pioneering role in instigating the philanthropic field, Harvey et al. re-examine and reinterpret Carnegie's career as a world-making entrepreneur, heavily engaged in institution building.[65] While Carnegie's ruthlessness towards clients, friends and foes alike severely dented his reputation, especially his role in the 1892 Homestead strikes, nevertheless he used his political clout as a wealthy steel magnate turned philanthropist for agenda-setting purposes in society, driving institutional change and promoting social improvement.[66] He set out the ethics of entrepreneurial philanthropy and put these into practice through the implementation of criteria-based grant making on a hitherto unparalleled scale. As Neil Fligstein remarks, institutional entrepreneurs can on occasion forge "entirely new systems of meaning".[67] Viewed through the lens of institutional entrepreneurship, Carnegie's pledge to invest socially almost all his accumulated fortune in the course of his life reconfigured the philanthropic field.[68] It reset expectations for other wealthy individuals to emulate (including Rockefeller and Mellon but also more recently Gates and Buffet) while reframing the compact between rich and poor, enhancing the legitimacy of the former, according to which wealth could be enjoyed provided it was given away in the lifetime of the holder, on the premise that "he who dies rich dies disgraced".[69]

The framework which *evolutionary theory* provides is likewise conducive to application in business history research. Evolutionary theory, according to Lippmann and Aldrich, integrates both narrative and social scientific modes of approaching the study of organizations, embracing the theoretical and empirical advantages of each by combining an emphasis on uniqueness, contingency and context with an equally weighted priority accorded to universal organizational processes.[70] This perspective joins hands with institutional theory in recognizing that organizations inevitably are fashioned by the contexts in which they were formed. However, whereas institutional theory lays emphasis on organizations absorbing and exuding the "rules, norms and ideologies of the wider society", evolutionary theory is less concerned with political norms and more preoccupied with the residue of historical origins that can endure from the point of an organization's creation over its ensuing life cycle.[71] As such, embracing an evolutionary perspective allows researchers to embed organizations within their historical contexts so as to link history and social structure; enabling researchers to "scan and collect a wealth of detailed studies on unique cases and comb them for similarities and differences".[72]

Lippmann and Aldrich draw on Victoria Johnson's study of the Paris Opera, which demonstrates that the circumstances of the Opera's origins at the moment of establishment became absorbed and sedimented within the institution, exerting a powerful influence for years to come.[73] In a similar vein, James Baron, Frank Dobbin and Devereaux Jennings trace the origins of the personnel function in the US to the demands of the state in a wartime economy, which bureaucratized employment relations.[74] They chart the evolution of bureaucratic controls that they attribute to the major role played by government requirements for information, which aided the growth of the personnel professionals who collected, collated and reported this data. In a similar vein, in exploring the development of firm capabilities in American bookselling, Raff shows that capabilities can persist, influencing the

development trajectories of his two case companies over several decades; albeit going hand-in-hand with incremental evolutionary change. He demonstrates that the divergent routes followed by the two bookstores under study are in part explained by new decisions, but also by previous choices rooted in the firms' early histories in response to specific contexts, such that "the value of the (historically) later innovations depends on the implementation of earlier ones".[75] In this way, Raff integrates an emphasis on the persistence of the effects of company resources and capabilities with an emphasis on evolutionary adaptation over time.

The evolutionary approach therefore implies a prospective, future-oriented outlook that gives prominence to the *longue durée* prized by Fernand Braudel.[76] This privileges a bottom-up perspective that reappraises consideration of firm origins and choices relative to outcomes.[77] It pays attention in this way to company failures that do not stay the course, often overlooked.[78] At the same time, it exemplifies how "historical analysis can add value by uncovering the long-run effects of particular choices".[79] Business historians, with a predilection for long-term, often lengthy studies featuring detailed evidence, are well equipped to make a significant contribution to the growing body of research on evolving organizations; requiring only a different "way of seeing" that entails a "forward-looking perspective and close attention to the development over time of selection environments".[80]

Our third suggested pathway that business historians might find amenable to follow in embracing historical organization studies concerns *Bourdieusian social theory*. Pierre Bourdieu is known as a sociologist and anthropologist, not as a historian; yet as Philip Gorski observes, he has the impulses of a historical analyst.[81] In particular, he identified as one of his most enduring objectives that of encouraging "the development of a unified social science, in which history would become a historical sociology of the past and sociology would become a social history of the present".[82] Bourdieu's *oeuvre* provides a conceptual arsenal that equips researchers for scrutinizing historical macrosocial change along the lines of the "big

questions" highlighted by Friedman and Jones.[83] His "master concepts" of capital (economic, cultural, social and symbolic resources), field (social spaces of objective relations between positions) and habitus (internalized dispositions) have attracted much attention from organization theorists.[84] These have also attracted the interest of business historians.[85] His theoretical armoury – comprising field theory, capital theory, reflexivity, class dispositions, doxa, homologies and the field of power etc. – provides useful tools with which to illuminate the barriers that abound in organizational and social life, past and present.[86] This theoretical armoury continues to hold considerable untapped potential. Particularly underutilized is his concept of the field of power, in which both the broad expanse of history and the social micro-processes that produced it are implicated, inviting further investigation at macro and micro levels, in which business historians are well positioned to play a leading role.[87]

Harvey et al.'s above-mentioned article on Andrew Carnegie adopts a Bourdieusian perspective that positions Carnegie as an influential actor in the field of power of his day in both the United States and further afield.[88] Through his philanthropy, and aided by the apparent disinterestedness this denoted, Carnegie acted strategically to expand his stocks of social and symbolic capital and access to prized networks: "What stands out… strongly is that philanthropy repaid him handsomely in terms of cultural, social and symbolic capital, increasing, not diminishing, his overall capital stock, and securing for him a position of influence as a multi-positional actor within the field of power".[89]

Bourdieu draws comparisons between the field of power and the intellectual field, which is similarly stratified and where analogous contests for control take place. He likens this to "a magnetic field, made up of a system of power lines", ruled by the logic of "competition for cultural legitimacy".[90] Viewed in this light, the projects in which scholars engage are always, for Bourdieu, studies awaiting recognition through the "consecration of success" conferred by the field.[91] Field theory concerns the positioning of individual actors

vis-à-vis others in the field.[92] As Fligstein observes, incumbent groups gain the most from fields, but challengers also benefit through survival, which can prove to be a springboard to a more central positioning within the field.[93] Bourdieu's comments therefore hold relevance for business historians, who are arguably located at the periphery of the business and management field.[94] Through more meaningful engagement with organization theory, business historians might assume a more empowered and central position within the "bigger tent" evoked by Hambrick, their legitimacy enhanced in consequence. If, in parallel, they can strengthen their voice by reconnecting with popular debates in business and management research, this may allow them to target the prized mainstream organization journals at the heart of the field, which aspire to publish on matters that appeal to the many rather than the few.

Embracing Theory in Business History Research

In conceptualizing historical organization studies, Maclean et al. (2016) identify five principles that are critical to marrying together the disciplines of history and organization studies successfully. These principles are: *dual integrity* (historical veracity and conceptual rigour), *pluralistic understanding* (openness to alternatives and different ways of seeing), *representational truth* (congruence between evidence, logic and interpretation), *context sensitivity* (attentiveness to historical specificities) and *theoretical fluency* (command of the conceptual terrain).[95] We pose these principles as guides to help business historians seeking to make the most of incorporating organization theory within their research designs and working practices. How, we ask, might these principles be used to help guide business historians in this endeavour, recognizing that they have pre-existing strengths as well as potential limitations to overcome? For example, one might expect the work of business historians to exhibit a high degree of context sensitivity but that they might struggle to match this with a corresponding level of theoretical fluency.

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Dual integrity, an overarching principle, signifies shared respect for and demonstrable proficiency in history and in organization studies, attributing equal status to both while striving to meet appropriate standards in each. Dual integrity concerns the production of historically informed theoretical narratives whose validity resides in historical veracity and conceptual rigour alike. Viewed from a business history angle, the emphasis here is clearly on the need for scholars to exhibit a sufficient understanding of and competence in organization theory, commensurate with their mastery of history. Competence in both disciplines is necessary to achieve authenticity, which in turn impinges on scholarly legitimacy.[96] Put simply, business historians can be taken more seriously by the business and management field if they learn actively to participate in the organization studies milieu. Legitimacy, Suchman argues, demands "a *relationship* with an audience".[97] More robust and theoretically informed research that relates more directly to the concerns of the business and management scholarly community may attract recognition from a wider audience than business history research traditionally has reached, with attendant status implications for the positioning of business historians within the field, meriting the investment required.

The principle of *pluralistic understanding* in the present context implies a need for business historians to open their minds to different perspectives to display interdisciplinary curiosity, boldness and breadth. Wilkins argues that examination of the "growth and development of business as an institution" should "never [be] narrow".[98] Yet too circumscribed an interpretation of business history as a discipline defined by its focus on the firm, on the basis that "[t]he firm as an entity with its changing package of attributes is what commands attention", precludes related issues which ought properly to fall within its broad ambit.[99] As Christine Rosen observes, the future of business history is unlikely to lie within an overly narrow compass, concerned with "purely internalist ways of conceptualizing our subject matter", but instead should embrace organizational issues with far-reaching social

impact.[100] Kenneth Lipartito argues that business historians need to expand their repertoire, adding texture in this way to current debates to which they have an obligation.[101] A strict understanding of the discipline is implicated in their relinquishing responsibility for framing the field.[102] There is a need for business history to reaffirm itself as an integrative discipline that elicits connections not only within firms and between firms, but more broadly "between systems and people, between the tangible and intangible, and, of course, between the past and the present".[103] A relaxation of boundary assumptions allowing greater porosity may boost interdisciplinary interplay and exchange, in particular with organization studies with which business history shares many common elements; enabling re-engagement with contemporary debates that affect present society.

Representational truth is potentially a strong suit for business historians concerned with "getting it right".[104] It places emphasis on the importance of accounts consistently *ringing true*, privileging "the testimony of the witness that provides correspondence between representation and the event" in order to maintain "the truth of historical discourse".[105] This joins hands with Raff's notion of "contingent truth" which does not seek to over claim by asserting that a proposition holds true in all possible circumstances, but rather invokes "a coherence theory of truth… showing how various salient bits of evidence fit together".[106] The search for historical veracity lays stress on economic actors and their actions, linking historical explanation with an empathetic understanding of human agency reminiscent of Max Weber's notion of *Verstehen*.[107] The quest for representational truth does not assume that the truth the researcher is searching for is readily apparent; on the contrary, it may require unearthing.[108] In this way it promotes bottom-up perspectives that lend themselves to "a return of the repressed", whereby material that orthodox narratives may have overlooked or camouflaged surges back to "discreetly perturb the pretty order of a line of progress or a system of interpretation".[109]

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Context sensitivity is a principle to which business historians are naturally attuned. As Robin Collingwood underlines, "no historical fact can be truly ascertained until we have ascertained its relations with its context".[110] Greater interaction between history and organization theory offers business historians the opportunity to display an in-depth, contextualized understanding of issues under scrutiny. Sensibility to particular situations matters in research pertaining *inter alia* to organizational evolution, entrepreneurship and industry emergence, with which context and contingency interact. Wadhwani and Jones highlight the embeddedness of specific entrepreneurial acts or organizations in the historical and temporal context(s) in which they were formed. This emphasis on the "temporality of entrepreneurship" and the significance of time and place stands in stark contrast to the bulk of organizational research, much of which is characterized by contextual limitation; exhibiting only a cursory interest in the specificities of particular historical circumstances.[111] It fails in this way to encapsulate "the rich manifestation of organizations in society".[112] Braudel likens researchers who lack context sensitivity to travellers who see always the same thing irrespective of the variegated countries and landscapes they traverse.[113] The context sensitivity of business historians, conversely, is likely to stand them in good stead when seeking to explain and articulate the dynamics of organizational change.

Achieving *theoretical fluency* is perhaps the stiffest challenge for business historians in embracing the principles of historical organization studies; hence the purpose of this paper. Nevertheless we believe that a fluid integration of organizational theory and historical empirical data is entirely feasible and attainable, targeting the intersection of theory with robust historical empirics by drawing out what is often already implicit. Collingwood maintains that contextual uniqueness in itself is not sufficient reason to eschew abstract rules, on the grounds that "uniqueness does not exclude points of identity with other unique cases".[114] The organizational theories outlined above are all conducive to analytically

structured history; all knowledge proceeding, according to Braudel, "from the complex to the simple".[115] Business historians are well equipped to propose hypotheses and typologies that contain answers to fundamental questions concerning the persistence of particular organizational forms: for example, why do some firms persist while others fail? Hence existing theory can be refined through historical study. The inclination to theorize derives from a search for patterns and frameworks that allows particular events and phenomena to be seen in conjunction with other analogous circumstances and occurrences, enabling parallels and variations in the trajectories of organizations across time and space to be discerned and conclusions to be drawn accordingly.[116] While Collingwood suggests that imposing analytic schemas and templates can prove restrictive, arguing "you cannot think historically by playing games with any formulae", Michel de Certeau counters this by explaining that attributing contour and shape to evidence responds to a natural impulse to elicit order and structure: "History furnishes the empty frame of a linear succession which formally answers to questions on beginnings and to the need for order".[117] Braudel likewise argues in favour of the "constant value" offered by conceptual models that enable researchers to see events and phenomena in combination:

> "Models are only hypotheses, systems of explanations tied solidly together in the form of an equation, or a function… The carefully constructed model will thus allow us to inquire, throughout time and space, into other social environments similar to the observed social environment on the basis of which it was originally constructed. That is its constant value".[118]

Ultimately, the very nature of business history, rooted as it is in specific geographical and temporal contexts, means that it is fertile terrain for bottom-up inductive theorizing that grows out of rich descriptions of particular historical examples, with the potential to give rise to the indigenous theorization anticipated by Suddaby.

Conclusion

This paper makes a contribution to the burgeoning research promoting a fruitful synthesis between history and organization studies. Contrary to the majority of publications on this topic, however, it does so from the perspective of exploring *what organization theory can contribute to business history*. We revisit, nuance and elaborate specifically for a business history readership five key principles of advancing historical organization studies – dual integrity, pluralistic understanding, representational truth, context sensitivity, and theoretical fluency – which we regard as conducive to conceptual interaction between history and organization theory. We exemplify this interplay with reference to three cognitive lenses amenable to application in business history, namely institutional entrepreneurship, evolutionary theory and Bourdieusian social theory. These are not intended as exhaustive, but rather as illustrative. What, one may ask, might be lost with a tighter focus on theory? We suggest that there is no need to lose the rich contextual detail and situated understanding emblematic of many business historical studies. However, discourse is a form of capital, as de Certeau insists.[119] Like other forms of capital, it can be maintained, accrued, eroded or forfeited. We suggest that by altering dispositions to embrace the conceptual language and analytical frameworks of organization theory, business historians can accumulate scholarly capital within this wider field by producing a more explicitly theoretically informed historical discourse. Aligning agendas and practices with the mainstream of business and management research may enhance the positioning of business historians within the scholarly community, enabling them to reclaim responsibility for framing the field while simultaneously reaching a broader audience in a route to enhanced legitimacy and impact.

For business historians to realize the promise of embracing more organization theory, two further points require emphasis. The first concerns the cultivation of greater reflexivity, as exhorted by Rowlinson et al., who specify the need for historians to locate and nurture their "own reflexive theoretical stance in relation to history".[120] These authors echo previous

calls for heightened reflexivity by Taylor et al., who view the exercise of reflexive practice by business historians as an ultimate objective, and Suddaby et al., who suggest that theorization requires an alert, self-reflective outlook.[121] This enhanced reflexive awareness that the production of theoretically informed historical discourse necessarily entails is implicated too in fostering the greater porosity and openness – combining rigour with flow – demanded by a pluralistic perspective.[122] Greater reflexivity can serve as a spur to creativity. It is time to break down the barriers to new theory creation erected by an overly conservative disciplinary stance. Such openness is also essential for re-engagement with the bigger issues of wide-ranging contemporary debates.

The second point we wish to underline here concerns the *practice* of historical organization studies. Historical organization studies are fundamentally pluralistic, as stressed; concerned with bringing different approaches to history and organization studies respectively. We contend that, after more than a decade of rumination on the need for and importance of the historic turn in organization studies, we may finally have reached the point where *it is time now to practice what has been proposed*. We concur with Wadhwani and Bucheli that it is timely to pursue this research agenda more vigorously by incorporating it into our actions as well as our thought processes.[123] Put differently, we suggest that the research conjuncture is now opportune for there to be less emphasis on contemplation and more on *enactment*, putting historical organization studies into actual practice. It is now up to the business history community to take the necessary steps to embrace the cognitive lenses and frameworks outlined above, which, amongst others, enable researchers to see the general in the particular, thereby reaping the benefits that an injection of organization theory can bring. We propose this as a research agenda, inviting business historians to expand their repertoire and rise to the challenge of enacting historical organization studies in their research. The richer, more robust, theoretically imbued historical studies that may result from this endeavour, informed

by both conceptual lenses and historical and contemporary observation, are likely to be well worth the efforts expended. Areas for further research incorporating this agenda include micro-history, getting away from the large scale of hegemonic metanarratives to focus instead on the micro-historical processes that comprise the daily experiences of individual firms and actors; as well as prospective and historical sensemaking, exploring how the past impinges on both the present and future in heterogeneous aspects of organizational and institutional life.[124]

Table 1: Business History: Perceived Failings and Recommended Solutions

Perceived Failings	Recommended Solution	Illustrative References
Business historians typically have been too narrowly focused on inward looking corporate history, neglecting numerous themes and issues within the broad natural purview of the field	Take a more expansive approach to the identification of themes and issues; recognizing the embeddedness of business in broader economic, social, political and cultural movements	Friedman & Jones (2011); Lipartito & Sicilia (2004); Raff (2013); Rosen (2013); Scranton & Fridenson (2013)
The field has been contorted by the dominance of American corporate ideas, assumptions, business models and practices	Promote comparative research to analyse national and international business systems, cultures, organizations and institutions	Friedman & Jones (2011); Harvey & Jones (1990); Steinmetz (2007a); Wilkins (1988)
Business historians typically have failed to contribute significantly to interdisciplinary conversations in the humanities and social sciences	Increase awareness of the possibilities for business history to contribute to current interdisciplinary themes, concerns and debates	Hall (1992); Lipartito (2013); Scranton & Fridenson (2013); Steinmetz (2007b)
The field exhibits a lack of reflexivity, maturity and sophistication with respect to methodology	Encourage methodological questioning and the exploration of fresh approaches to research and writing	Raff (2013); Scranton & Fridenson (2013); Rowlinson et al. (2014); Taylor et al. (2009)
Business historians have typically been empirically oriented and frequently neglectful or dismissive of relevant theory	Engage more fully with relevant theory as a means of identifying, exploring and explaining complex phenomena	Booth & Rowlinson (2006); Lamoreaux et al. (2007); Maclean et al. (2016); Rowlinson et al. (2014)

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