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HISTORICAL ORGANIZATION STUDIES

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SUMMARY

Historical organization studies denotes organizational research that draws on historical sources, methods and knowledge to promote historically informed theoretical narratives attentive to both theory and history. It thus aspires to *dual integrity*, whereby organization theory and history inform one another without either becoming dominant. By historicizing organizational research, the contexts and forces bearing upon organizations may be more fully recognized and analyses of organizational and institutional dynamics improved. This chapter explores, through three illustrative projects, different ways in which historical organization studies might be enacted: an archival-based exploration of the construction since 1945 of the global hotel industry; an oral-history project on corporate governance and executive remuneration; and a database-centric study of philanthropy in North East England between 1830 and 1939 drawing on diverse primary sources. The methodology's main strength lies in explicating the processes at work in the emergence, institutionalization and maintenance of contemporary phenomena of substance and import.

INTRODUCTION

Historical organization studies (HOS) denotes organizational research that draws on historical sources, methods and knowledge to promote historically informed theoretical narratives attentive to both theory and history (Maclean et al., 2016: 609). It is an outgrowth of a distinctive academic movement that over recent decades has called for more serious study of the role of history in shaping the past, present and

future of organizations and institutions (Kieser, 1994; Zald, 1993). The 'historic turn' in organization studies is in effect an epistemological paradigm shift promoted by scholars who argue that business and management research has been constrained by its preoccupation with contemporary cross-sectional studies covering limited periods of time, paying little or no attention to history or context (Clark and Rowlinson, 2004; Mills et al., 2016). The error in preferencing synchronic over diachronic research methods, it is argued, lies in ignoring the sheer weight of the past as a determinant of present strategies, structures, cultures and practices (Kieser, 1994; Wadhwani and Bucheli, 2014). As Hobsbawm (1998: 31) observes, 'we swim in the past as fish do in water and cannot escape from it.' Only by rebalancing away from the synchronic and toward the diachronic, embracing transdisciplinary convergence, might full account be taken of temporal forces and contexts when theorizing about stability, reproduction and change within organizations and institutions (Leblebici, 2014; Wadhwani et al, 2018). This necessitates engagement with historical sources, including the documents found in organizational archives (Decker, 2013; Lipartito, 2014), which, in the words of Rowlinson et al. (2014: 251), are of value not only as sources of data, but also because they 'represent evidence that remains largely unexplained by organization theory.'

Building on these ideas, Maclean et al. (2021c: 4) set out a vision for HOS as 'a distinctive epistemological and methodological approach that develops a historical research strategy within the broad field of organization studies.' Central to this endeavour is the principle of *dual integrity*, which holds that HOS should exhibit both *historical veracity* and *conceptual rigour*, the former a *sine qua non* for historians and the latter prized by organization theorists. On the one hand, historical veracity refers

to the test routinely applied by historians that their reconstructions and interpretations of past events should be congruent with all known evidence, not just a selection of that evidence (Collingwood, 2002: 7-38). It is an article of faith that inconvenient evidence cannot be ignored. Veracious historical research is predicated on 'an exhaustive … review of everything that may be germane to a given investigation' since observation of 'this principle provides a manifest and efficient safeguard against the dangers of personal selection of evidence' (Elton, 2002: 60). On the other hand, conceptual rigour demands mastery of the relevant theoretical terrain in order to, *inter alia*, frame questions, develop lines of enquiry, form and test hypotheses, identify connections between events and systemic variables, and ultimately form coherent explanations of organizational and institutional phenomena. As Sutton and Staw (1995: 378) observe, strong theory, besides identifying the nature and direction of causal relationships 'is laced with a set of convincing and logically interconnected arguments' with implications that often 'run counter to our common sense'. We hold that historically informed theoretical narratives, the authenticity of which stems from both historical veracity and conceptual rigour, make a strong and singular claim to scholarly legitimacy within the broad field of business, management and organizational research.

In this chapter, we outline and illustrate the main methodological principles underpinning HOS and its implications for the study of organizations and organizing. Our purpose is to offer interested scholars practical insights based on our own experience of researching and writing in the genre. In the next section we identify and discuss five defining principles of HOS. We then consider how each of these informed and shaped three recent and ongoing projects. In the final section, we

consider the lessons learned from conducting these and other projects, and the prospects and possibilities for HOS.

METHODOLOGICAL PRINCIPLES

Organization studies is not the first sub-field within the social sciences to undergo a transdisciplinary convergence with history. Economic history and historical sociology are notable precursors (Leblebici, 2014). Only since the late 1980s, driven by dissatisfaction with the limitations of neo-positivism, have fresh avenues gradually begun to open for building a fruitful relationship between history and organization studies (Üsdiken and Kipping, 2014). In recent years, however, what was formerly a trickle of historically rooted organizational scholarship has become a groundswell boosted by special issues of leading journals across nearly the entire field of business and management. What is particularly impressive, as a recent collection of essays on HOS confirms (Maclean et al. 2021a), is the range and diversity of the historical scholarship on display, spanning many eras, cultures and topics, and the novel theoretical ideas stimulated by the authors' research. The development of a theory of historical reflexivity by Durepos and Vince (2021), and Bastien et al. (2021: 101) study of how indigenous organizations connect with their past, are telling examples of how engaging with history can help challenge 'taken-for-granted universal theories' of organizations and organizing.

We propose that by historicizing organizational research, the contexts and forces bearing upon organizations may be more fully recognized and analyses of organizational and institutional dynamics improved (Wadhwani et al., 2018). Delivering on this promise, however, is made problematic by the challenge of dual integrity because, as Maclean et al. (2016: 609) point out, 'the authenticity of theory

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development expected by organization studies and the authenticity of historical veracity required by historical research place exceptional conceptual and empirical demands on researchers.' In other words, it is not a simple matter to write theorized narratives attentive to the demands of both history and organization theory. Hence the need to articulate more fully the methodological principles underpinning HOS. In doing so, we are informed primarily by personal experience of jointly authoring 15 articles in the mode of HOS and responding to the challenges set by journal reviewers and editors. In the remainder of this section, we consider in turn each of the five methodological principles of HOS.

First principle (engage with a contemporary issue of substance and import)

According to Geoffrey Elton (2002: 59), 'the first principle of historical understanding' is that 'the past must be studied in its own right, for its own sake, and on its own terms.' This is a view still shared by many professional historians who see their primary purpose as creating narratives of the past based on evidential traces found in documents and other artefacts, and driven by two fundamental questions: 'what evidence is there, and exactly what does it mean?' (Elton, 2002: 59). From this perspective, historians are under no obligation to infer lessons for the present based on their research into the past. Indeed, it would be unwise to do so because all past events existed *sui generis* within a complex web of relationships, imperfectly known and irreproducible. Thus, the value of history lies not in directly imparting practical lessons, but in 'its true purpose … its contribution to the intellectual improvement of mankind' (Elton: 107-8).

We do not lightly dismiss the traditional empiricist view of history championed by Elton (2002), but, as proponents of HOS, we contest the claim that history should always be studied 'for its own sake'. Rather, following Friedman and Jones (2011),

we suggest that historical research is vitally necessary to discovering and understanding many of the root causes of the big challenges facing the world today. This is because many of these challenges – increasing inequalities of income and wealth, climate change and environmental degradation, for example – are not the outcomes of passive evolutionary processes, but of socially constructed and episodic human interventions and actions impacting differentially and cumulatively on individuals, organizations, institutions, economic, social and political systems, and the natural world. Discovering, documenting and explaining how these challenges have arisen is a necessary first step in the quest for solutions. Therefore, the first methodological principle of HOS we propose is to *engage with a contemporary issue of substance and import*.

Second principle (embed studies in relevant literature)

Rowlinson et al. (2014) highlight significant epistemological differences between history and organization theory relating to explanation, evidence and temporality. Underlying and reinforcing these are equally profound differences in working methods. Differences in the use and referencing of prior literature are exemplary. As in any academic discipline, historians read extensively on and around their topic, and critically appraise the literature to identify what is already securely known, what is not known, or what is said to be known, but for whatever reason cannot be trusted (Tosh, 2010: 175-210). Knowledge is advanced both by filling in lacunae and by taking issue with other historians whose representations of past events are perceived to be flawed, either for want of evidence or sound logic in the interpretation of evidence (Carr,1990: 7-30). Disputes over evidence and interpretation are commonplace and integral to the (re)emergence of consensus within the field (Evans, 2000: 224-253). However, the context for such disputes and

resolutions is rarely established by means of a systematically presented literature review. The preferred method is seamlessly to interlace prior findings, new research findings, and argumentation within the structure of historical narratives (Braudel, 1980; White, 1987: 1-57).

In marked contrast, organization studies, HOS included, proceeds according to established social scientific procedures. No empirical article is likely to accepted for publication in a leading business and management journal without the research being underpinned by a formally conducted, systematically ordered and coherently presented literature review. A sound literature review does much more than summarising what has been written on a topic to date (Easterby-Smith, Jaspersen, Thorpe and Valizade, 2021: 23-66). Rather, it serves as an orienting device that both establishes a credible *raison d'être* for the present study and introduces the terminology and constructs that will be drawn on subsequently in advancing novel arguments and theoretical ideas. It is essential to show how the present study builds on prior research while demonstrating the potential to go further and add in a meaningful way to the established literature. This might be achieved variously by drawing on relevant authorities from diverse quarters, reviewing how knowledge of a topic has evolved, or by exposing theoretical or empirical differences between prior studies (Golden-Biddle and Locke, 2007: 31-37). Whichever path is chosen, the connections between the literature review and all that follows must be established and maintained. Hence the second methodological principle of HOS proposed here is that researchers should *embed studies in relevant literature*.

Third principle (analyse rich verifiable historical datasets)

A second important epistemological difference between traditional history and organization theory relates to scholarly apparatus. By convention, social scientists

discuss their research design, sources, processes and analytical methods prior to presenting their findings. No such requirement is felt by traditional historians who, as with literature, subsume methodological considerations within the flow of the historical narratives they construct (Decker, 2013; Yates, 2014; Maclean et al., 2016). In this, the focal issue is the status, with respect to extent and strength, of evidence found in documents and other historical sources (Evans, 2000: 103-128). Matters relating to the provenance and reliability of sources, known as source criticism, are to the fore (Bloch, 1954: 66-113; Elton, 2002: 66-76). However, while a digest of sources may be provided, the data extracted from individual sources is rarely collated and presented as a structured dataset. Rather, individual sources are drawn on discretely to help describe and explain whatever historical phenomenon is under consideration (Rowlinson et al., 2014).

Organization theorists, in contrast, favour constructed datasets amenable to quantitative or qualitative data analysis over unmediated collections of primary sources. In HOS, as in economic history and historical sociology, the need is to conform to established social scientific standards with respect to the construction, analysis and documentation of historical datasets (Ventresca and Mohr, 2002; Yates, 2014). The implications are fourfold. First, it is necessary, as in all forms of historical research, to determine the provenance of sources and the reliability of the data extracted from them (Lipartito, 2014; Kipping, Wadhwani and Bucheli, 2014). Second, data should be extracted from sources (rarely one and most often many) on a consistent and principled basis to ensure that constructed historical datasets are coherent and as representative as possible of the population of origin, with any systematic biases acknowledged (Harvey and Press, 1996; Ventresca and Mohr, 2002). Third, full justice should be done to the historical record. Documents and

other sources, as precious survivals from the past, often contain an abundance of rich data. Detailed source analysis is often needed prior to the construction of a mediated dataset to avoid loss of valuable data, especially relating to outliers and exceptions (Ventresca and Mohr, 2002; Lipartito, 2014). Fourth, all sources and procedures used in the construction of a dataset should be documented, and data 'triangulated' whenever possible (Kipping et al., 2014; Yates, 2014). The ideal is to make datasets available to other researchers for verification and future use (Maclean et al, 2020b; Maclean et al, 2022b). It follows that the third methodological principle of HOS is that studies should be squarely *founded on the analysis of rich verifiable historical datasets*.

Fourth principle (express theoretical ambition)

The status of theory in history is contested (Hall, 1992). Traditional empiricist historians view the use of pre-formed theoretical ideas in historical interpretation as anathema, riding roughshod over 'the very essence of the discipline' (Tosh, 2010: 219). Such fierce hostility to abstraction and generalization stems from the conviction that historical change can only properly be understood in context, from the ground upward, free from the implicit determinism of top-down theorization (Carr,1990: 56-86). Objectors to this viewpoint rightly point out that the past is about far more than uniqueness; it is also, and arguably predominantly, about regularities, commonalities and permanence (Braudel, 1980; Hobsbawm, 1998). Systemic change, therefore, including so-called revolutions, can only be measured and explained in relation to what remains the same. Historians, in explaining continuity and change, routinely identify, assess, and connect causal factors when interpreting any aspect of the past (Carr,1990: 87-108). It follows that relevant social scientific theories, when evaluated

in relation to well-constructed datasets, might both aid historical interpretation and suggest refinements to theory (Burke, 2005).

Situated at the conjunction of history and organization theory, HOS promises to animate theory through engagement with historical data (Wadhwani et al., 2018). Maclean et al. (2016: 611-15) propose that this may be done in four main ways: in testing and refining theory (evaluating mode), in generating new theoretical constructs (conceptualizing mode), in applying and developing theory to reveal the operation of transformative social processes (explicating mode), and in explaining the form and origins of significant contemporary phenomena (narrating mode). In each case, the form and function of the relationship between theory and history differs, creating an array of possibilities pertaining to the application and development of theoretical ideas in the form of constructs, propositions, hypotheses, and statements of causal relationships (Bacharach, 1989; Suddaby, 2010). Gathering and reading historical sources created in real world settings can serve as a 'theorizing trigger', as the researcher 'moves back and forth between the empirical evidence and the literature … to build a theoretical story' (Shepherd and Suddaby, 2017: 70). This involves creating explanations by inferring causal relations consistent with available data, through what Weick (1989) calls 'disciplined imagination' and historians call 'historical imagination' (White, 1973; Collingwood, 1994; Elton, 2002). *Expressing theoretical ambition* is thus the fourth methodological principle of HOS.

Fifth principle (intend a meaningful theoretical contribution)

Elton argues (2002: 44) that 'historical knowledge gives solidity to the understanding of the present and may suggest guiding lines for the future', but that this should never be the primary purpose of historical research. History, he insists (2002: 42), 'is legitimate in itself, and any use of it for another purpose is secondary.' It is against

the standard of 'good in its own right' that traditionalists assess the contribution to knowledge made by works of history. Landmark publications like Anderson's history of the origin and spread of nationalism, in which he famously defines a nation as 'an imagined political community' (2016: 6), exceptionally have sparked conversations around the world about important historical phenomena. Most historical research is far less impactful, but this matters little because sound historical research 'contributes to the improvement of man … by seeking the truth within the confines of its particular province'. Historians are thus granted license to research whatever topics motivate them, provided that they satisfy 'the conditions of professional competence and integrity [that] fulfils the historian's very important social duty' (Elton, 2002: 44).

HOS, in bringing together two disciplines, is subject to more exacting standards with respect to expected contribution. Writing veracious histories alone is not enough. Beyond this, practitioners are expected to demonstrate a material contribution to theoretical knowledge within the field; every top-tier organizational, business or management journal requiring 'a "theoretical contribution" before a manuscript will be considered for publication' (Corley and Gioia, 2011: 12). This requirement is not as daunting as it might first seem. It is commonly understood that few researchers develop fully formed theories *ab initio*; the vast majority contributing to theory development incrementally through critique, modification, extension or refinement (Whetten, 1989). In engaging with extant literature, HOS researchers have the opportunity by demonstrating incompleteness, inadequacy or incommensurability to expose deficiencies in existing theory and authoritatively put forward their own theorized storylines (Golden-Biddle and Locke, 2007: 36-60). Research based on rich historical datasets has the in-built advantage of supporting

critiques and suggesting additions and reformulations to existing (often static or comparative static) organizational theories (Suddaby and Foster, 2017; Suddaby et al., 2020; Durepos et al., 2021). Accordingly, the fifth methodological principle of HOS proposed here is that researchers should *intend a meaningful theoretical contribution*.

ILLUSTRATIVE PROJECTS

The intellectual journey of the present authors leading to HOS began when collaborating on an extensive cross-national study of business elites in France and the United Kingdom (Maclean et al., 2006). As business historians working in business schools, we had responded positively to institutional pressure to contribute more directly to conversations within mainstream management research. The book and related articles stemming from the project were thus hybrids, historically contextualized but founded on two contemporary datasets, one quantitative (multi-table prosopographical database), the other qualitative (interviews with top executives). However, what was decisive in making the project a success was the deep dive we took prior to writing into the sociological theories of Pierre Bourdieu, as elucidated and applied in *Distinction* (1986), *The Logic of Practice* (1990), and *The State Nobility* (1996). Armed with Bourdieu's theories of capital, field, habitus and the field of power, we were thus able to conduct far more incisive analyses than would otherwise have been possible, adding to the quality, originality and generalizability of our research. We have since extended our theoretical 'repertoire', but what we took from Bourdieu remains fundamental; the idea that the value of critical social theory lies in 'making the hidden visible', unmasking the social processes that maintain elite domination (Maclean and Harvey, 2019).

Following the elites project, the next step was to utilise Bourdieusian theory in our historical research and to draw conclusions relevant to the present, as well as the past. In a study of the career of Andrew Carnegie, we articulated the theory of entrepreneurial philanthropy as a transactional process of capital conversion and accumulation (Harvey et al., 2011), and, extending Bourdieu's ideas in *Distinction* (1986), we put forward a process model of taste formation, transmission and institutionalization, introducing the novel concepts of 'lesser emblems of distinction' and 'sentimentally evocative goods' (Harvey et al., 2011). These pioneering articles satisfied several of the methodological principles of HOS enumerated above, especially with respect to theoretical ambition and contribution. However, they remained resolutely old school business history in not offering a formal, conventional literature review nor an explicit account of our methodology and methods. It was only when our research on history and strategic change at Procter & Gamble came to fruition that we convincingly satisfied all five criteria (Maclean et al., 2014; Golant et al., 2015; Maclean et al., 2018; Maclean et al., 2020a). While these exemplars of HOS are published in mainstream organizational research journals, signalling acceptance of methodological legitimacy within the field, we have made sure never to lose sight of our 'home base', the business history journals where much of our work is published and to which we have contributed variously over many years.

Our overall experience is one of growing interest in HOS among editors, publishers and business school colleagues. In the remainder of this section, we illustrate the five methodological principles of HOS through a discussion of three recent and ongoing projects. A summary is provided in Table 1 for ease of reference. Our purpose in doing so is to offer general guidelines for scholars interested in HOS as a methodological template for their own research.

First project (global hotel industry)

In our experience, HOS projects typically progress through three main stages, which in shorthand we refer to as scoping, executing, and delivering. In the scoping stage we answer three fundament questions corresponding to principles one to three above: what problem, what literature, and what data? It is premature to think too hard about theorization and intended contribution. In the case of the global hotel industry, we were drawn to the topic by pre-existing research interests in internationalization and the growth of multinational enterprises. What struck us was the domination of the industry by a relatively small number of multinationals with multiple brands, active in multiple market segments. We were interested to know how this situation had come about, and how it might be explained. No ready-made answer was found on reviewing the extensive literature on the internationalization of firms and the growth of multinational enterprises. What we observed, however, is that the literature is dominated by cross-sectional economic studies with relatively few significant historical contributions. Herein we perceived an opportunity to contribute. But how? Following the lead of Khanna and Jones (2006: 453), we reasoned that the best approach was to conduct longitudinal research applying 'rigorous methods for analysing small-sample and qualitative data.' After a search for archival sources, we selected Hilton Hotels as the most promising case study, since its extensive archive could be readily accessed at the Hospitality Industry Archives of the University of Houston.

The executing stage of our research involved discovering, gathering and organising sufficient historical data to shed light on how the global hotel industry came to be configured as it is today. We soon discovered that the Hilton Archive

consists of thousands of files, each with numerous documents, assembled through a succession of deposits of personal and business papers. Like many archives, it is imperfectly catalogued with few finding aids (Decker, 2013). Our first choice, therefore, given the impossibility of even skim-reading all the material was to limit our documentary search to the period 1946 to 1969, from the incorporation of the Hilton Hotels Corporation to the retirement of its founder, Conrad Hilton, and to concentrate on the growth of its international business (Lipartito, 2014). Our second choice was to focus on creating digital copies of three main types of documents: annual reports and accounts and other policy documents; documents relating to the building, opening and operation of hotels in the chain; and transcripts of 62 major speeches delivered by Conrad Hilton to external audiences between 1950 and 1965. Given the systemic coherence of these documents, each type created to fulfil a regular public or private purpose, it was possible to extract or order data contained within them, enabling the construction of datasets amenable to systematic analysis.

Delivering is the most intellectually demanding stage of any HOS project and may extend over many years. At this stage, methodological principles four and five come to the fore. However, it is only by reading and analysing the project data, locating them in their cultural, social and temporal context, engaging in hermeneutic interpretation, that you can determine the realms of possibility with respect to theorization and contribution (Kipping et al., 2014). In the global hotel industry case, we have come to view Hilton Hotels as a pioneer striving to insinuate a new business model – domestically owned hotels managed by multinational companies – in countries with disparate business cultures, political regimes and legal systems. In our writing to date (Maclean et al., 2018; Maclean et al., 2021b), we have drawn on institutional theory allied to Bourdieusian theory to explain the international diffusion

of the currently predominant business model. In particular, we have shown how Hilton's project was discursively and practically allied to the reconstitution of the post-war international order under US leadership. Our main theoretical contribution is to show how an individual's institutional biography can play a pivotal role in their development as an institutional entrepreneur and the institutionalisation of a new organisational template (Maclean et al., 2022a). What this project has exemplified for us as authors is how each avenue taken may lead to others, progressing and deepening preceding paths in the process.

Second project (executive remuneration)

The constitution and functioning of business elites is core to our overall academic project, and perhaps the most controversial topic within this domain is the escalation in top executive pay over recent decades, contributing significantly to pronounced increases in inequalities of income and wealth in many countries around the world (Piketty, 2014). Rising levels of executive pay have not been matched and cannot be justified by improvements in corporate productivity and financial performance (Li and Young, 2016). How can this situation be explained? How has it been allowed to happen by shareholders and governments who know that there is no economic or moral justification for what has occurred? These are the questions animating our research on corporate governance and executive remuneration in the UK (Price et al., 2018; Harvey et al., 2020).

The focus of our research is on the attempts made to address the problem through corporate governance reforms, and in particular those introduced following the recommendations of the Greenbury study group on directors' remuneration published in 1995. The Greenbury Report determined that executive pay should be linked to performance through long-term incentive plans, and that full details of

executive remuneration should be disclosed to shareholders. Greenbury assumed that if shareholders had knowledge of pay arrangements, they could exercise control, prevent abuse, and curb the escalation in executive rewards. To discover how and why Greenbury came up with this formulation, which econometric studies have proved counter-productive (Li and Young, 2016), we decided, since no documentary sources existed other than the study group report, to collect oral history testimonies from surviving members of the Greenbury study group and their advisors. Ten interviews were conducted, including one of more than two hours with its chairman, Sir Richard Greenbury.

Decker et al. (2021: 1137-1140) describe oral history research of this kind as 'retrospective organizational history', the Greenbury study group being in effect a temporary organization established to perform a one-off service: to restore faith in a system of corporate governance perceived to be failing. By comparing accounts, and notwithstanding differences in recollection and emphases, we were able to reconstruct how the study group was set up, the evidence it considered, the discussions that took place, the variety of opinions expressed, and how the final recommendations emerged and were written up. We examined the data through the lens of elite theory, recognizing that study group members were representative members of the ruling elite, closely connected to the political establishment and operating within the national field of power. Thus, while the group may have failed to halt the escalation in executive pay, it succeeded in its primary purpose of restoring the moral authority of the UK system of corporate governance (Harvey et al., 2020). In this case, valuable insights into how elites maintain systemic order would have been lost without the evidence provided in oral histories, supporting the case for

more extensive deployment of oral history in organizational research (Keulen and Kroeze, 2012; Maclean et al., 2017; Decker et al., 2021).

Third project (entrepreneurial philanthropy)

Specification of the theory of entrepreneurial philanthropy, as already mentioned, was the first contribution to organization theory we made through the medium of HOS (Harvey et al., 2011). It sparked a passion to understand more about how elite philanthropy functions within complex social systems to consolidate and perpetuate elite power, legitimating inequalities in social, cultural and symbolic capital as well as in the economic sphere (Harvey et al., 2021; Maclean, Harvey, Yang and Mueller, 2021d). In conceiving a HOS project that might progress this agenda, we were struck on reviewing the literature by the marginalization of philanthropy within the mainstream of social scientific research. There is popular interest in philanthropic giving by the wealthy, but this is not matched by comparable academic endeavours, neither contemporary nor historical. As the editors of a recent journal special issue observe, philanthropy research has only recently begun to shake off its designation as a 'supplementary subset of non-profit or third-sector scholarship' outside the mainstream of organizational and management research (Harrow, Donnelly-Cox, Healy and Wijkström, 2021: 304).

Recognizing that so little is known about the changing nature, scale, impact and *modus operandi* of philanthropy led us to undertake HOS research on North East England, which to date has led to publications on entrepreneurial philanthropy (Harvey et al., 2019) and the diffusion of philanthropic models (Harvey et al., 2020; Yang et al., 2021). The first article is based on *longue durée* research into philanthropy and social innovation, revealing the deeply historical nature of the language and practices of philanthropy (Braudel, 1980). In this case, as in others,

immersion in rich historical data, observing regularities and continuities as well as changes and discontinuities, triggered theorization and led us to make a series of propositions about philanthropy and institutional change (Harvey et al., 2019). It also brought us to conceive an original 'systemic model of elite philanthropy' whose value lies in understanding relations between philanthropic capital stocks and financial flows (Maclean et al., 2021d: 335).

However, we believe that we have so far only just scratched the surface of what is knowable about the origins, nature and consequences of elite philanthropy. In taking forward our North East project, we have created and are populating a relational database of donors, gifts and sites of philanthropy, in which each datum is traceable to a source document and repository. The goal is to quantify philanthropy diachronically and synchronically by cause, site, donor and donor type between 1830 and 1939, when the region was in its industrial heyday, and philanthropy funded many thousands of social organizations. To complement the database findings, and add depth to the enquiry, we intend to conduct case study research on a sample of 60 representative donors and 60 representative sites of philanthropy spread across eight philanthropic domains. This is a high-risk venture, comparable in scale, scope and method to our earlier project on business elites and corporate governance (Maclean et al., 2006). It is a daunting prospect, but one that holds much promise, empirical and theoretical.

DISCUSSION AND CONCLUSION

Establishing HOS as a distinctive approach to management and organizational research has been the work of many minds over many years, including those of Kieser (1994), Üsdiken and Kieser (2004), Clark and Rowlinson (2004), Suddaby et

al. (2010), Kipping and Üsdiken (2014), Wadhwani and Bucheli (2014), Rowlinson et al. (2014), Maclean et al. (2016), Vaara and Lamberg (2016), Suddaby and Foster (2017), Decker et al. (2021), and Maclean et al. (2021c). The collective achievement of these and other likeminded authors has proved decisive in three main ways. First, they have won the argument for history playing a more central role in organizational research, re-establishing the connection with the historical sociological approach to organizations and organizing taken by Max Weber (Clegg et al., 2021: 232-33). Secondly, they have identified obstacles to progress and shown how these might be overcome, thereby delineating the conditions for future success (Rowlinson et al., 2014; Maclean et al., 2016). Thirdly, they have shown how theory and history working together can generate both new theoretical constructs and compelling reconstructions of past events, structures and phenomena (Hatch and Schultz, 2017; Ravasi et al., 2019).

However, not all contributors to the emergence of HOS will necessarily agree with all of the methodological guidance offered in this chapter, which might seem overly prescriptive, potentially inhibiting creativity because the template for empirical studies suggested by our five methodological principles reflect an overtly mainstream social scientific bias. In other words, the principles, if adopted *in toto*, might serve to constrain rather than liberate the historical imagination. We do not share this critique. In our experience, as we hope to have shown by means of our three illustrations, the historical imagination is often liberated by the necessity to address present day issues, critical reading of extant literature, analysis of carefully constructed datasets, engagement with theory, and the demand made by editors and reviewers to demonstrate a meaningful theoretical contribution. We hold that the academic legitimacy of HOS stands or falls by respecting the methodological norms prevailing

in the broad field of business, management and organization studies. It is entirely reasonable that we should press for 'acceptance of more heterogeneous forms of history, and reflexive accounts of the social construction of historicized narratives' (Durepos et al., 2021: 449), but it would be misguided to propose that HOS research should be judged by radically different methodological precepts than those valued by our peers in the wider organization studies community. To do so might incur charges of special pleading and would not serve the up-and-coming scholars who choose to build their academic publishing careers in this area.

In our own research, we have sought consistently to apply the five principles of HOS as we progress through the three stages of scoping, executing and delivering described above. *Scoping* requires openness to possibility. Our interest in a topic is often sparked by contemporary debates in which elites are implicated, such as those surrounding the escalation in executive pay or philanthropic giving by the mega-wealthy (principle 1). We begin by reading widely around the topic from popular books and so-called grey literature (media reports, publications by think tanks, governments, non-governmental organizations and social media) to more disciplined academic publications (principle 2). Our approach to the literature – popular and academic – is to subject it to critical review to establish what is known and what is not known about the subject, leading to a provisional list of research questions. *Execution* requires the development of viable research design. This involves making critical choices with respect to time period, scope and data sources. Our main concern is to access the primary sources needed to create a rich and well-organized dataset amenable to systematic analysis (principle 3). *Delivery* demands intensive engagement with theory (principle 4) and the pursuit of empirical and theoretical novelty (principle 5). Our method is abductive, moving back and forth

between data and theory, searching for systemic continuities, discontinuities and situational logics while refining constructs in pursuit of strong explanations of organizational and institutional change.

HOS, as a research methodology that explicitly embraces theory and the theorization, proceeds from the standpoint that method and theory development are closely aligned, frequently intertwined processes, as articulated by Andrew Abbott in his discussion of time, events and causality in *Time Matters* (2001). In this (pp. 288-290), Abbott argues in favour of 'a narrative program of research' wherein the narrative is 'inherent in the social process itself' and intertwined with other narratives in 'interactional fields … governed by complex contextuality in time and space'. Defining and understanding sequences of events, plots and periodization in effect become 'the central task of conceptualization'. There are two main implications. First, theorizing is inherent within HOS because complex, interrelated events and plotlines cannot be identified and interpreted by means of empirical enquiry alone. Second, it is in reflexively breaking from the orthodoxies of linear hypothesis testing social science research methods that HOS opens up the intellectual space needed to ask new questions and identify previously overlooked issues (Decker et al., 2021). In other words, HOS, as one of many competing organizational research methodologies, gains strength from simultaneously embracing historical veracity and theoretical rigor.

Adherence to the methodological principles outlined in this chapter has opened up a wealth of fresh possibilities for historically oriented organizational researchers, the realization of the 'historical turn' being marked by the recent spate of special issues of top tier management and organization journals, including the *Academy of Management Review* (41-4, 2016), *Organization Studies* (39-12, 2018),

and the *Strategic Management Journal* (41-3, 2020). The first of these special issues is devoted to conceptual papers, the other two, editorial essays apart, are given over predominantly to empirical papers, six in *Organization Studies* (Basque and Langley, 2018; Oertel and Thommes, 2018; Maclean et al., 2018; Blagoev et al., 2018; Lubinski, 2018; Cailluet et al., 2018), and seven in the *Strategic Management Journal* (Pillai et al., 2020; Lubinski and Wadhwani, 2020; Arikan et al., 2020; Agarwal et al, 2020; Lamberg and Peltoniemi, 2020; Sinha et al., 2020; Sasaki et al., 2020). Three things stand out from reviewing the content and composition of this 'collection' of 13 exemplary articles. First, each of the articles fully conforms to five methodological principles of HOS, confirming the commonality of expectations of authors, reviewers and editors. Secondly, that HOS is a 'broad church' with respect to sources, methods and empirical domain. Of the 13 studies, nine are qualitative, three use mixed methods, and one is quantitative; 10 make extensive use of archival sources, four analyse quantitative datasets, three use material from organizational websites, and one incorporates field observations; six are rooted in Europe, four in Asia-Pacific, and three in North America; just one study covers a period of less than 20 years, four of up to 50 years, and eight of more than 50 years. Thirdly, that HOS research exhibits a high degree of flair and originality with respect to theory, history offering fresh perspectives to ongoing conversations within field. Contributions are made to the theorization of rhetorical history, intertextuality and the management of change (4 papers), organizational identity (2 papers), nationalism and nonmarket strategy (2 papers), industry evolution (2 papers), history as a strategic resource, organizational memory, and strategic pivots and economic experimentation as antecedents of firm strategy.

We conclude that HOS, as an academic venture motivated by the desire to bring history back into the mainstream of management and organizational research, has already delivered much and promises to deliver far more. Embracing the five methodological principles championed here will contribute significantly to the realization of dual integrity, the defining quality of HOS.

ANNOTATED FURTHER READING

For readers new to historical organization studies and wishing to learn more about this burgeoning field of research, we strongly recommend beginning by reading four landmark publications, two excellent edited collections and two foundational theoretical articles.

(1) Bucheli, M. and Wadhwani, R.D. (eds.). (2014). *Organizations in time: History, theory, methods*. Oxford: Oxford University Press.

The editors and contributors to this volume lay the groundwork for historical organization studies by outlining the limitations of cross-sectional organizational and institutional research, and by making the case for more historically grounded studies. The requirements for transdisciplinary convergence are outlined, and the value and use of historical sources in organizational research are demonstrated.

(2) Rowlinson, M., Hassard, J. and Decker, S. (2014). Strategies for organizational history: A dialogue between historical theory and organization theory. *Academy of Management Review*, 39 (3): 250-274.

Like item (1), this article is foundational to the emergence of historical organization studies as a distinctive mode of organizational and institutional enquiry. It calls for 'greater reflexivity regarding the epistemological problem of representing the past' and highlights three epistemological dualisms that might if left unrecognized impede conversations between historians and organization theorists. Recognition of the three dualisms has paved the way for improved strategies for more fruitful engagement between history and organization theory.

(3) Maclean, M., Harvey, C. and Clegg, S.R. (2016). Conceptualizing historical organization studies. *Academy of Management Review*, 41 (4): 609-632.

Building on items (1) and (2), the authors define and elaborate the idea of historical organization studies as 'organizational research that draws extensively on historical data, methods, and knowledge to promote historically informed theoretical narratives attentive to both disciplines'. They demonstrate four main ways in which this might be accomplished in practice

by advancing a typology of four conceptions of history in organizational research. Five enabling principles are identified – dual integrity, pluralistic understanding, representational truth, context sensitivity, and theoretical fluency. Dual integrity is foremost among these.

(4) Maclean, M., Clegg, S.R., Suddaby, R. and Harvey, C. (2021). *Historical organization studies: Theory and applications*. London: Routledge.

Since the publication of items (1), (2) and (3), historical organization studies has emerged as a distinctive methodological paradigm within the broad field of business, management and organizational studies. The editors review what has been achieved and restate and reflect on foundational principles. The substantive chapters together demonstrate how by historicizing organizational research, the contexts and forces bearing upon organizations can be more fully recognized and analyses improved. Taken individually, the chapters demonstrate variety in the selection of sources, theories and methods, providing models to inspire and potentially adapt.

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Table 1. Methodological principles of historical organization studies exemplified

Principle \ Project	Global hotel industry	Executive remuneration	Entrepreneurial philanthropy
Engage with a contemporary issue of substance and import	Dominance of multi-brand, multi-segment global hotel groups	Escalating levels of top executive remuneration	Re-emergence of elite philanthropy as powerful force in society
Embed studies in relevant literature	Internationalization and growth of multinationals	Corporate governance	Elite philanthropy
Analyse rich verifiable historical datasets	Linked datasets based on original sources on the growth of Hilton International	Set of oral history interviews with members/advisors of Greenbury committee	Database of donors and sites of philanthropy and archivally based case studies
Express theoretical ambition	Institutional theory allied to Bourdieu's construct of the field of power	Agency theory, elites and institutional change	Elites, social movements and entrepreneurial philanthropy
Intend a significant theoretical contribution	Shows how an individual's institutional biography can play a pivotal role in institutional entrepreneurship	Exposes disclosure as an ineffectual institutional fix contrived by elites to preserve the institutional status quo	Demonstrates how social innovation arises at the conjunction of social activism and entrepreneurial philanthropy