

# ON HISTORY, BUSINESS, AND MANAGEMENT: A REVIEW OF THE LITERATURE AND RESEARCH AGENDA

## Sobre história, gestão e negócios: uma revisão da literatura e agenda de pesquisa

Ítalo da Silva<sup>1</sup>

Elisabeth Cavalcante dos Santos<sup>1</sup>

*1 Universidade Federal de Pernambuco, Recife, Pernambuco, Brazil.*

### ABSTRACT

**Purpose** – The purpose of this article is to conduct a systematic review of the literature on business history and management history in specialized journals in the area.

**Design/methodology/approach** – We conducted a systematic review of the literature in the journals: Business History, Business History Review, Journal of Management History, and Management & Organizational History, between 2011 and 2020. In all, we analyzed 231 articles using the open, axial coding technique, and selective.

**Findings** – We answered two central analytical questions about the researchers' theoretical-methodological choices and summarized the results in six research lines. Historiographic approaches are presented from the epistemologies, theories, methods, contributions, limitations, and research problems chosen by the researchers in their articles.

**Originality/value (mandatory)** – The article is contributory when it assumes the central premise that the understanding of the researchers' theoretical-methodological decisions results in the historiographic approaches adopted in business and management research. Also, we offer a research agenda concerned with problems about (1) marginal empirical contexts, (2) the comparative approach to history; and (3) the perception of the past as a historical narrative.

**Keywords** - Historiography; Epistemology; Method; Theory.

### RESUMO

**Objetivo** – O objetivo deste artigo é realizar uma revisão sistemática de literatura sobre a área da história dos negócios e a história da gestão em periódicos especializados.

**Projeto/metodologia/abordagem** – Realizamos uma revisão sistemática de literatura nos periódicos: Business History, Business History Review, Journal of Management History e Management & Organizational History, entre os anos de 2011 e 2020. Ao todo, foram analisados 231 artigos usando o técnica de codificação aberta, axial e seletiva.

**Achados** – Respondemos a duas questões analíticas centrais sobre as escolhas teórico-metodológicas dos pesquisadores e resumimos os resultados em seis linhas de pesquisa. As abordagens historiográficas são apresentadas a partir das epistemologias, teorias, métodos, contribuições, limitações e problemas de pesquisa apresentado pelos pesquisadores em seus artigos.

**Originalidade/valor** – O artigo é contributivo quando assume a premissa central de que a compreensão das decisões teórico-metodológicas dos pesquisadores resulta nas abordagens historiográficas adotadas nas pesquisas em negócios e gestão. Além disso, oferecemos uma agenda de pesquisa preocupada com problemas

sobre: (1) os contextos empíricos marginais, (2) a abordagem comparativa da história; e (3) a percepção do passado como uma narrativa histórica.

**Palavras-chave** - Historiografia; Epistemologia; Método; Teoria.

## 1 INTRODUCTION

Social research wins when it does not neglect the interdisciplinary contribution of human sciences by engaging in new research phenomena, theories, and methods (Lawrence, 1984). There seems to be some consensus in the literature that applied social sciences in general, and the business and management area in particular, have distanced themselves from the human sciences (Zald, 1993; Kieser, 1994; Greenwood & Bernardi, 2013) and, in particular, of history (Zald, 1993; Clark & Rowlinson, 2004). That made Zald (1993, p. 514) claim that the “social sciences central issues, are explained in the human sciences” and, therefore, there is a consistency in relating these areas of knowledge to what the author called “humanistic turn.” A decade later, the movement entitled “historical turn” by Clark and Rowlinson (2004), started to gain strength with an article published in the Business History (BH) journal. Soon after, the periodical Management & Organizational History (MOH), was inaugurated in 2006 as an unfolding of this movement that promised to make management studies, “more historical.”

Bowie (2019) argued that MOH and the Journal of Management History (JMH) are the two major journals in the study circle of management that have a close connection to history. JMH recently dedicated a special edition to commemorate the 20 years of existence of the journal, renewing its commitment to continue the debate between the disciplines of management and history (Carragher, 2015). In parallel, the business area has been involved with history for a long time. Both Clark and Rowlinson (2006) stated that business history has its well-defined journals such as BH and the Business History Review (BHR). Butzbach’s (2018) argument is quite enlightening when he points out that, during the 20th century, management studies have gradually moved away from business history intending to provide more formal and objective analyzes. In this context, the author clarifies that it is possible to perceive that the “historical turn” left the management area with accentuated theoretical and methodological gaps that need to be under investigation.

In the field of business history, Hansen (2012, p. 715) requested that business historians develop analytical strategies that could contribute to “new knowledge and better communication and cooperation with the social sciences”. Not unlike the request made by Hansen (2012), about the present management research, Greenwood and Bernardi (2013) asked for cooperation between the theory of organizations and the discipline of history. If we base ourselves on the statement by Rowlinson et al. (2014, p. 252), that the use of “historiography has not yet received the same systematic analysis in the theory of organizations”, so the time has come to carry out this systematic analysis inspired by invitation made by Batiz-Lazo (2019), when it encouraged researchers to engage in critical reviews of the literature that emerged from the movement entitled “historic turning point”. Therefore, the central objective here is to conduct a systematic review of the literature concerning the business history and the management in specialized journals between the period of 2011 to 2020.

Perhaps Booth and Rowlinson (2006, p. 19) exaggerated when they argued that neither management professionals nor academics in the field “know much about business history or the history of management and managerial thinking”. Barros and Carrieri (2015) seem to agree when

they pointed out that, in the Brazilian context, the construction of historical narratives about management is still timid or incipient. Therefore, we agree with Schwarz (2015) that management history and business history are prominent circles in scientific production that need to go under review. Some literature review articles that we have examined are narrow in scope in analyzing scientific production and limited when they are not concerned with proposing a research agenda (e.g. Rowlinson & Hassard, 2013; Schwarz, 2015; Steele et al., 2015). The concernment about such reviews was the measurement of citations and the impact factor of the articles (e.g. Jain & Sullivan, 2015; Ojala, Eloranta, Ojala & Valtonen, 2017).

According to Ojala et al. (2017, p. 308), “only rarely the content of articles has been analyzed in more detail,” and we have the conviction that these literature reviews did little to systematize what Schwarz (2015, p. 499) called “the cumulative tradition of search.” Also, the answer to the intriguing questions of Rowlinson et al. (2014) about what types of stories the community has written or, yet, what stories they have read in the scientific production of the business and management area? Such behavior is because the thematic analyzes used in the reviews have not discussed, or have limited, the theories and methods used in the articles. Therefore, our systematic review of the literature focused on the qualitative dimension of analysis from two questions. The first is: what are the epistemological positions and theories used by researchers in response to their research problems? And the second: how did these epistemological and theoretical choices of researchers delimit methodological decisions in making historiographic research operational?

Thus, the central premise that guides this text is that understanding the researchers’ theoretical-methodological decisions helps to understand the historiographical approaches recently adopted in a particular area of business and management research. Besides, we seek to encourage researchers to look for new scientific research problems when we propose a research agenda. Therefore, we hope that this article will contribute in response to Hansen’s claim (2012, p. 710), when saying that there is always a choice to be made, depending on the ontological and epistemological views of the researcher, and show methodological alternatives that mitigate the complaints of Decker, Kipping, and Wadhwani (2015, p. 2) when they defended the development of a variety of reflective methodologies in historical research.

## **2 THE RELATIONSHIP BETWEEN HISTORY, BUSINESS, AND MANAGEMENT**

It is not new today that literature in the area of business and management has been involved with history, or as some authors usually call it, with the “treatment” or “use” that is made of the past (Lawrence, 1984; Clark & Rowlinson, 2004; Wadhwani, Suddaby, Mordhorst & Popp, 2018).

This is particularly true, for example, in the discipline of business history. Austin, Dávila, and Jones (2017) state that, in 1928, Harvard Business School had fundamental importance in studies that sought to understand how history could be used in teaching new managers and administrators to understand the problems that happened at the time. In the area of management studies, this debate intensified during the 1990s, and discussions took on the possible approach between the discipline of history and the theory of organizations (Zald, 1993, 1996). Kieser (1996) was very precise in his essay entitled “Because the theory of organization needs historical analysis”, and sagaciously argued how these analyzes could be done.

The convincing argument of Greenwood and Bernardi (2013, p. 923) that there cannot be Organizations without History, History without social organization, and Sociology without History, tries to accommodate the inherent needs of the theory of history and social theory in a request for cooperation between the areas of the study. This request for cooperation comes almost a decade after Clark and Rowlinson (2004) called for a “historical turn” in management studies which happens simultaneously to the argument of Rowlinson (2013, p. 327), in an editorial letter in the MOH, stating that “there has been more progress towards a historical turning point in the theory of organizations” in specialized journals in the area such as BH, BHR, JMH, and MOH. Thus, we need to point out that the little debate about the past, history, and historiography among organizational researchers seems to have started since Lawrence (1984) proposed using the past to study the present questions.

Later on, the stated objective of Booth and Rowlinson (2006, p. 9) in promoting “in a historical manner informed writing in the theory of organizations” undoubtedly resembles the request for cooperation between the disciplines made by Greenwood and Bernardi (2013) and ratified later by Maclean, Harvey & Clegg (2016). Thus, some concerns and typologies were the focus of recent debates in conceptual studies that tried to understand how historiographic approaches were used by business and management researchers (e.g. Rowlinson et al., 2014; Maclean et al., 2016; Subbady & Foster, 2017).

Wadhvani et al. (2018, p. 1666) recently demonstrated the concern to distinguish past and history when they pointed out that, “the term, ‘history’ can be deceptively slippery.” The authors complete the argument by stating that the past can be interpreted as events that happen before the present under chronological reasoning, while history is understood from the uses that social actors make of this past. The business historian Hansen (2012, p. 700) came to recognize that “history is one of the most powerful forces in society.” Durepos, Shaffner, and Taylor (2019, p. 9) understand historiographic approaches (or historiography) as extensive research processes in which theorists transform “the past into history” through writing.

Batiz-Lazo (2019, p. 114) provided a counterpoint to the postmodernist movement called the “historical turn” - when he says that this movement is a “myopic and technically poor approach”. The author makes severe criticisms of the theoretical propositions informed by them that left “a conceptual and empirical void after an elaborate criticism” (2019, p. 122). Within the scope of business history, Hansen (2012) similarly, discussed the different epistemological views that the literature in the area seems to adopt in research. The author wrote that “from a constructivist and narrative point of view, an organization (or nation, community or individual) does not just have a history” (Hansen, 2012, p. 701).

As for the discussion of method, De Jong, Higgins, and Van Driel (2015) suggested a different methodological approach towards a “new business history”. The authors were concerned with defending the “application of empirical methods that examine ideas and theories, subjecting them to rigorous hypothesis tests” (2015, p. 11). Decker et al. (2015, p. 2) stressed that “business history does not easily fit into any categorization of the old versus the new”, and soon they were concerned with advising that methodological choices are related to the epistemic assumptions of each particular research project. Thus, Rowlinson et al. (2014) understand the hypothesis test in historiographical research as “serial history” - in which the phenomena under study, are repeated, and the theories are possible of testing. For the authors, other strategies are also possible. However, corporate history seems to stand out if compared to different arrangements, such as analytical structures and ethnographic-history.

Other authors who were also concerned with developing a typology of historiographical research strategies were Maclean et al., (2016). For them, this typology would be the basis for the

development of historical studies in organizations. According to the study, history is possible to arrange as evaluation (theoretical test), narrative (sensitive to the socio-cultural context), explanation (interpretations of the broader social processes), and conceptual (new theoretical constructs). Regarding these possibilities, Suddaby and Foster (2017, p. 20) state that “there are important differences in how we theorize history”, and elaborate a typology of four different historiographical approaches. History as tangible facts is the positivist view of history in which the past comes with a linear interpretation, continuous and restrictive of human action in the present. History thought of as power is strongly influenced by Marxist studies and historical materialism, although the objectivist view of history still prevails. Rhetorical history and the history as a producer of meaning consider the subjective participation of human agency to be decisive in the method of history is narrated, with the perception of history as a strategic narrative and phenomenological interpretation being important.

Although Subbady and Foster (2017, p. 19), have the conviction that “typologies offer excellent reviews of the literature”, similar to the position of Maclean et al. (2016, p. 609) when they argue that they developed their typology “based on previous research”, none of these studies have been concerned with systematizing scientific production recently. In our systematic review of the specialized literature, we found four literature review surveys and one bibliometric analysis that present a narrow scope of articles analyzed, and there is no proposal for a research agenda (Jain & Sullivan, 2015; Schwarz, 2015; Steele et al., 2015; Rowlinson & Hassard, 2013). Thus, we seek to overcome these limitations through a broader systematic review for the area of business history and management history.

### **3 METHODOLOGICAL PROCEDURES**

The main objective here is to conduct a systematic review of scientific production specialized in the circles of business history and management between the years 2011 to 2020, using the methodology of Systematic Literature Review (SLR). This methodology allows the recent mapping of the scientific literature produced in a given area of knowledge (Sylvester, Tate, & Johnstone, 2013). At the same time, RSL integrates evidence from individual research as a set of systematized knowledge (Elsbach & Van Knippenberg, 2020) that makes it possible for future researchers efforts focus on new original research (Wolfswinkel, Furtmueller, & Wilderom, 2013; Okoli, 2015). More specifically, we analyzed scientific production from four specialized journals, namely: Business History (BH), Business History Review (BHR), Journal of Management History (JMH), and Management & Organizational History (MOH). The decisions, which guided the SLR methodological protocol, were based on the suggestions of Sylvester et al. (2013), Wolfswinkel et al. (2013), Okoli (2015), and Elsbach and Van Knippenberg (2020).

Therefore, we use the following phases of SLR adapted from the literature:

(1) The article’s analysis concentration area was the one, wherein, the disciplines of business and management dialogued directly with history. The choice of BH, BHR, JMH, and MOH journals is justifiable by the fact that there is a consensus in the literature that recognizes these journals as the main channels of dissemination in the area of business history and management (Rowlinson, 2013; Greenwood & Bernardi, 2013; De Jong et al., 2015; Batiz-Lazo, 2019).

(2) The choice of the period, which we demarcated between 2011 and 2020 for the search for articles, was defined based on the literature’s recommendation to map the most recent scientific evidence (Okoli, 2015; Elsbach & Van Knippenberg, 2020). Also, the most comprehensive

literature review we found was the proposal by Rowlinson and Hassard (2013), which considers the years 1991-2010. Although the purpose of this review is divergent when compared to ours, we believe that its scope in terms of articles and time marks the beginning of a new SLR.

(3) Still, when it comes to the planning of the methodological protocol. We organized a spreadsheet in the Microsoft Office Excel software with initial analysis categories for data collection of the selected articles. The main analytical categories were: (I) general organization data (text title, author-date, and journal); (II) objective (s) and theme (s) researched; (III) epistemology, theories, and methodological choices (when applicable); (IV) main research results and contributions and (V) indication of future research by the authors of the articles.

(4) The descriptors used for the search and selection of articles were: "history", "historiography", "historical", "historic" and "past". The articles were selected when these descriptors appeared explicitly in the title, abstract, or keywords. The reading of the abstracts from the articles performed, at this stage, as a refinement of the chosen articles. The articles search was carried out on the editorial page on the internet where the journals remain hosted.

(5) The selection of articles took place between 03/18/2020 to 07/14/2020. Among the 2011-2020 period, ten volumes and 77 editions were considered in BH, ten volumes and 37 editions in BHR, ten volumes and 38 editions in JMH, and ten volumes and 36 editions in MOH. In total, 242 peer-reviewed articles, were selected, initially. After the analytical screening of articles, we did not include in the review: notes, book reviews, the introduction of special edition or reply messages, retractions, and corrections. At the end of this screening, a total of 231 peer-reviewed articles were selected for analysis. Of these articles: 74 were from BH, 34 were from BHR, 58 were from JHM, and 65 were from MOH.

The analysis of the selected articles followed the guidelines in three stages by Wolfswinkel et al. (2013) in an analytical coding process: (1) open coding; (2) axial coding; and (3) selective coding. All stages of the analytical coding process were guided by central research questions. In the initial open coding process, we sought to associate the articles in comprehensive lines of research based on the general topics covered, theories used and/or methodologies employed. Consequently, the main results, contributions, and limitations presented by the articles were also taken into account in this first moment of analysis. The basis for the analysis of the open coding was the spreadsheets created in the Microsoft Office Excel software that had the categories of initial analysis that we stipulated before the data collection. In all, there were four worksheets organized by specific journals.

From this opened analytical process, the researchers' interpretive and subjective capacity reflects the association between concepts, theories, and methods that resulted in broader research lines (Sylvester et al., 2013; Wolfswinkel et al., 2013). The associative synthesis of articles in research lines presented 11 initial categories indexed by thematic subcategories bringing such papers grouped. For example, the line of research categorized as "Economy, Capitalism, and Globalization" has indexed articles in subcategories such as "entrepreneurship", "globalization" and, or "State and reforms".

After this initial phase of analysis, the resulting 11 categories went through the axial coding process in which we associated analysis categories that relate themselves from theoretical and methodological themes and affinities. For example, the category "Disciplines, authors and textbooks" with its subcategories of "academic discourse", "managerial education" and "entrepreneurial disciplines" were indexed to the broader category of "Management, Work and Management Ideologies".

This process of synthesis of research results with axial coding made it possible to delineate which focus of analysis the authors were concerned with providing in their research, at the same time that it was possible to delineate more clearly the main problems and objectives that the authors sought to answer in their investigations. Throughout the codification process, we carry out constant comparative analyzes between categories and subcategories of the research lines until reaching the theoretical saturation of the key concepts, methodological similarities, and scientific contributions resulting from the indexed research in each broad line of scientific research, as recommended by Wolfswinkel et al. (2013).

At the end of the axial coding process, it was possible to reach the result of 6 lines of consensual research with research problems, contributions, and well-defined limitations. The last step of the analysis process was the selective coding that happened, simultaneously, to the writing process of the section entitled "Results and Discussion" of this research. At this moment, the main task was to search the broad body of 231 analyzed articles, those that best represented the central analysis categories in each proposed line of research. Also, each category and subcategory of analysis went through analytical and conceptual refinements that resulted in the best clarity of the discussion provided in the six lines of research. Finally, we built a research agenda based on methodological weaknesses, recurring criticisms, and suggestions for new investigations presented by the authors in their articles.

## **4 RESULTS AND DISCUSSION**

We organized the results and discussion section into 6 broad lines of research that were summarized in table 1. In sequence, the main discussion topics presented are: (1) the researchers' theoretical analysis focus; (2) the central research problems; (3) research contributions; and (4) the limitations presented in each line of research.

### **4.1 ON CAPITALISM, BUSINESS NETWORKS, AND ENTREPRENEURSHIP**

The economic theories of capital and the history of capitalism were used in a theoretical article by Levy (2017) when the author argues that capital is a pecuniary process of investment evaluation that can become a material factor of production. Caferro (2020) takes a step back in the history of pre-modern Christian Europe, more specifically in Florence, Italy, to argue that the process of capitalist production, or "capitalization", under the terms of Levy (2017), is the result of the intrinsic relationship between religion and the economy. In his theoretical essay, Caferro (2020, p. 57) argues:

"I hope it has become clear by now that God, was woven into the economic system."

This same line of reasoning is, used to understand capitalism as a process and its importance for the different ways of understanding modernity, including pointing out the relevance of partnerships between local traders and family businesses (Trivellato, 2020). Fusaro's theoretical essay (2020) requested that business historians analyze the macroeconomic processes and varieties of capitalism and that the maritime business sector is a satisfactory context for this task to begin. Goodchild's research (2017) followed a line of theoretical-causal explanation about the industrial advance of cheese exports in the city of Ontario in Canada. Through an environmental approach to comprehend global food business networks.

Global trade networks presented by researchers as influencing economic growth and entrepreneurship and Italy is a recurring locus for this discussion (Amatori, 2011; Picciaia, 2017), with a slight appearance from India and Honduras (Nayak & Maclean, 2013; Roscoe, Cruz, & Howorth, 2013). Discursive and institutional theories were used to understand the coevolution of entrepreneurship as a performative and transactional character (Nayak & Maclean, 2013), while the relationship between the action-interaction-institutional process enables entrepreneurs to overcome resistance to change (Smothers et al., 2014). By the economic approach, Toninelli and Vasta (2014) showed that innovative and internationalized entrepreneurs are fundamental for economic and capitalist development. But it was Colli and Larsson (2013) that better explored this relationship between entrepreneurship and internationalization. The authors did this by using interviews and documents to argue that family businesses allow a governance structure based on affective trust and freedom in choosing the internationalized business model.

In general, industrial corporations and business networks are the focus of empirical analysis of business history, as Both and Rowlinson (2006) had already commented and, later, placed as a research strategy by Rowlinson et al. (2014). What is clearer now is that while business historians have followed economic theories of capital, value generation, capitalization, and governance structure in the market to guide their research in the archives, organizational theorists have opted for institutional, discursive, and actor-network to understand the development of entrepreneurship and management models. With that, we contributed by realizing that the analysis of macroeconomic factors such as commercial partnerships, business networks, and the institutional environment was preponderant to understand the economic improvement on the western side of the world. We also highlight the problem of representing empirical studies limited to Europe and the USA, as stated by Picciaia (2017), and was problematized in research such as that of Casson and Lee (2011, p. 12) that “omitted the markets in Asia, Africa, and the Middle East” of its analysis.

#### **4.2 ABOUT STRATEGIES, INVESTMENTS, AND INTERNATIONALIZATION**

Zan’s question (2016, p. 3) “what is new in the field or in the notion of the strategy itself?” It is a good way to begin to understand international business behavior and the efforts made to maintain its longevity in the market. Clark and Rowlinson (2004) exposed the strong inclinations of this research area to discuss the Chandlerian paradigm, the resource-based view, and the theory of path dependence from research with case studies. Lockett and Wild’s (2014) article recalled the importance of Edith Penrose’s work for understanding the strategic management of multinational companies and foreign direct investment (FDI).

The internationalization theory, the structure-performance-strategy, and the FDI were used on an epistemological basis to understand the multinational companies’ behavior. Buckley, Cross, and Horn (2012) analyzed how Japanese multinational companies invested directly in India and concluded, based on quantitative data from 518 Indian companies, that political and regulatory regimes were significant drivers of the free market. If, on the one hand, the organizational capacities, assets, and acquisitive property of companies seem to be of significance for internationalization (Ryggvik, 2015), on the other, FDI, through international subsidiaries, has been shown to develop strategic alliances between multinational and local companies in the generation of employment (Kohar, McMurray, & Peszynski, 2017).

By and large, the Chandlerian paradigm of structure-strategy-performance (Sivramkrishna, 2014), dependence on the path (Schreyögg, Sydow, & Holtmann, 2011), and internationalization and life cycle of companies (Panza, Ville, & Merrett, 2018) are still significant research guidelines. What

can be understood so far is that the analyzes on the multidivisional structure and strategic management are preponderant in the area. The predominance of statistical methods, hypothesis testing, and research case studies would be what Maclean et al., (2016) called “history as evaluation”, or Suddaby and Foster (2017) named “history as fact”, wherein the past seen as a laboratory ready for testing “T” hypotheses. On the other hand, De Jong et al. (2015) would argue that studies under this line of research follow a “scientific approach” in business history when looking for generalizations. What diverges in this discussion is that qualitative methods prevail in research on FDI, although the predominant data analysis is the one already criticized by Clark and Rowlinson (2004), and pointed out by Rowlinson et al. (2014), which follows the chronology of the facts as if the story were linear.

#### **4.3 ABOUT REGULATORY SYSTEMS AND COMMERCIAL LAW**

Such research segment suggests the importance of investigating laws and regulatory systems diversely, involving commercial law, market regulation, and legislative theses. This increased appreciation of the relationship between law and business inspired Dahlén and Larsson (2014) when they proposed that legal analysis is a method that expands the scope of tools for researchers in the area. The authors rely on socio-legal theory and institutional theory to state that the approximation, between business history and legal history, provides an understanding of the relationship between commercial prosperity and co-regulation laws. Authors such as Lamoreaux, Sokoloff, and Sutthiphisal (2013) opened a broad discussion of copyright, trademark registration, and patent legislation to expose how brands and patents convey values and social identity.

A different group of researchers was concerned to understand how legislative changes impacted business strategies, and, the social responsibility of organizations. Taylor’s research (2013), in newspapers and 19th-century legislation in England, brought data presenting that the growth of the economic press, plus, the news about the trade of the time, put into question the importance of the reputation of companies. Thus the regulatory role of the press was limited by laws on defamation.

Consequently, companies began to worry about the social image they carried.

Boon (2019) brings the most recent discussion about the oil industry and decarbonization to exemplify how this economic sector responds to government regulatory pressures. Duquette (2019) analyzed changes in the US tax system and found business strategies in the tax economy through the policy of donations and charities. These researches have shown the importance of interdisciplinarity in the bubble of business history and management history in the legal field. Interdisciplinarity is already requested by Hansen (2012) and Greenwood and Bernardi (2013), although not in the terms proposed by these authors.

We also realized that even when Rowlinson et al. (2014), Maclean et al. (2016) and Suddaby and Foster (2017) developed their research strategies and typologies, they seemed to encompass in a limited way the studies of this particular line of investigation. For example, even though Rowlinson et al. (2014) talked about “corporate history”, and Suddaby and Foster (2017) referred to “rhetorical history”, it is limited to say that the complexity of the broader social analyzes between the government and the market stimuli is observed only under the analytical focus corporation in an explanatory perspective of the theory of history (Maclean et al., 2016).

In this way, we contribute by realizing that the authors of the researches that make up this line, in particular, develop their analysis based on varied methodological techniques to understand how the extroverted power of nation-states has suffered political influences that impacted the (de)

regulation of markets and economic prosperity. Simultaneously, macro-social legal analyzes helped to understand the economics nuances and responses of market agents. It seems, therefore, that the legal regulatory systems and the market are studied under macroeconomic and political analyzes, the interaction between public-private sectors and legislative concessions as suggested by Barjot (2011).

#### **4.4 ON HISTORIOGRAPHY, METHODS, AND HISTORICAL SOURCES**

The request made by Both and Rowlinson (2006), to make management and business “more historic”, could hardly be answered without going through a frank discussion about historiography, method, and archival sources. Giertz-Mårtenson (2012) used the tone of the reservation to remember the project of preservation of the corporate documents of a multinational in the fashion industry in Stockholm, Sweden, as a form to collect, preserve and save historical data. Muldoon (2019), for his part, formulated harsh criticisms of the book entitled “A New History of Management”, derived from the “historic turnaround” movement proposed by Clark and Rowlinson (2004), for being “antihistory” and not providing sufficient historical evidence for the “new” versus the “old” argument.

If, on the one hand, it is possible to find researches concerned with quantitative methods to demonstrate a causal relationship, regressions and correlations of historical data as presented in the discussion performed by Morck and Yeung (2011), and demonstrated in the research results of Ronsse and Rayp (2016), on the other hand, we will observe that qualitative methods of interviews in oral history, elucidation of images and videos are also present (Śliwa, 2013; Biswas & Jerrard, 2018). For example, Ronsse and Rayp (2016) examined the quantitative growth in the number of advertisements by local shopkeepers in Ghent city, Belgium, in the 18th century, from Granger’s causality analysis using statistical regressions. Olejniczak, Pikos, and Goto (2019) use a longitudinal qualitative approach following the style prescribed by Lawrence (1984), with a case study in a centenary-Polish company to show the aspects of management continuity.

Among qualitative and quantitative methods, Bowie (2019) demonstrated that newspapers might present themselves as a variety of archival sources. Therefore, archives as a source of historical information are: (1) evaluated as significant for the practice of historiographical research and the archival collections of corporations are valuable for the business and management area (Hull & Scott, 2020); (2) make it possible to discuss marginal historical issues, sometimes silenced or neglected by researchers (Decker, 2013); and, therefore, (3) either from the actor-network approach (Pfefferman, 2016) or through Foucaultian analyzes (McKinlay, 2013), the archives are spaces of methodological reflections in which the researcher needs to see and describe the information from the past.

We cannot say that the involvement of the management and business area with history has shown a preponderance by statistical methods and realistic approaches over the past, although many studies went this way when they chose to apply statistical probability tests with regressions and serial correlations. To this trend, Rowlinson et al. (2014) called the strategy “series history”, and Maclean et al. (2016) named “history as an evaluation”. However, we can say that while articles published in BH and BHR have shown to prefer quantitative methods and case studies concerned with explaining the problems of correlation and causality between historical data and facts, articles published in JHM and MOH opted to follow qualitative methods such as interviews in the construction of oral history and critical discourse analysis. And, if the statement made by Hansen (2012) that there are always theoretical choices to be made by researchers is veridic, we can say

that researchers in business history and management history are making such choices in an inhomogeneous way.

#### **4.5 ON CRITICAL APPROACH, HISTORICAL NARRATIVES AND MEMORIES**

Srinivas's inquiries (2012, p. 240 and 242) asking "how is the past studied?" and "have the past of organizations and organizational theory been read, in the opposite direction?" Such inquiries are the results of critical approaches to the past that arise to relativize the story told in the mainstream area. And Durepos, Mills, and Weatherbee (2012) theorized the early following the guidelines of Max Weber. But it was the rescue of René Descartes's cartesian dualism and Michel Foucault's philosophical propositions that Butler and Dunne (2012) rethought the limits of history. Given these options of understanding the past, business history is also a writing process from the birth of narratives as those suggested by Popp and Fellman (2017). For the authors, questioning how and what is written by business historians is the first task of engagement for a story creation composed of narratives. These historical narratives may be responsible for instituting inequalities and power relations.

Empirical research has intensified these arguments and evidence has shown that historical narratives have provided the basis for concatenating shared power identity strategies. Kroeze and Keulen (2013) related tradition and customs to narratives that are invented and cause inequality, using the oral history method in a project on leadership in Dutch business life in the 1970-2010 period. The main results showed that AkzoNobel's traditions, symbols, and history were considerable resources for communicating organizational changes. At Philips and Shell, the invented traditions demonstrated the shared corporate identity and memory.

Thereby, we can also emphasize that new collective identities are constructed in symbolic and cultural aspects from the remaining narratives of the organizations institutional past (Lamertz et al., 2016). At the same time, at broader levels of analysis, empirical evidence shown that the analytical combination of memories, narratives, and stories are simultaneously intertwined in creating the collective cultural identity of management, business, and specific society (Mordhorst, 2014). All of this empirical evidence that refined the theory is important to understand what Suddaby and Foster (2017) classified as "rhetorical history". More specifically, this review of a piece of literature contributes to the understanding that narratives and memories about the past are places of power that cause accentuated inequalities.

This present line of research demonstrated the relevance of oral history and interview techniques as methodological possibilities for capturing the narratives, metaphors, and subjectivities of the past in the elaboration of identity and collective memories (Maclean, Harvey, & Stringfellow, 2017). In turn, ANT-history's critical historiographical approach brought together the theoretical perspective of the sociology of knowledge and the methodological alignment of actor-network theory to show historical narratives that were neglected in the archives (Coller, Mills, & Mills, 2016). Thus, the way the past is accessed and the narratives told from it showed that history is articulated as a rhetorical device, whether in the creation of organizational traditions and symbols or in the way corporate and social memories can connect the past, present, and future (Kroeze & Keulen, 2013).

#### **4.6 ON MANAGEMENT, WORK, AND MANAGERIAL IDEOLOGIES**

Contemplating this particular line of research, the set of investigations carried out appeared to be enthusiastic about the research field proposed by Booth and Rowlinson (2006) called “organizational history”. But perhaps, what Booth and Rowlinson (2006) could not have predicted more than a decade ago, was the research argument made by Nylehn (2011), that the history of management studies is not as unitary and consensual as is ordinarily assumed. That is due to the evolution of management as a scientific field that has shown relevant traits of interdisciplinarity, and the fragmentation and specialization of the area have deep roots in the historical constitution of knowledge, both academic and professional (Van Baalen & Karsten, 2012).

An example of a foray into history by organizational theorists is the research carried out by Tongo (2012). The author uses philosophical assumptions of human nature based on the logic of the knowledge economy to highlight the characteristics that contemporary managers must adopt in coordinating organizational work. The main conclusion of the research is that the homo complexus is being replaced chronologically by human nature that constantly seeks knowledge and the improvement of intellectual capital in organizations. Magnusson (2014) made his historical journey through the relationship between business history and the history of work. The author also uses a chronological perception of the history of the three industrial revolutions to argue that the formation of companies, the expansion of the market, and strategic changes in business management are phenomena intertwined with the logical organization of work.

In these examples, it was easy to see what Schwarz (2015, p. 499) pointed out in his literature review, such as the concern of researchers to understand the “evolution and historical impacts of the main concepts” in the area. Thus, they were even suggested as the main conclusions of the systematic reviews made by Jain and Sullivan (2015) and Schwarz (2015) at JHM, that pioneering theorists and formulators of subdisciplines in the management area tend to be among the most recurrent research themes while having the articles with the highest citation rates. That is because organizational researchers have engaged in revisiting the foundations of organizational theory in characters like McGregor, Frederick Taylor, and even Hawthorne Studies (Head, 2011; Tikhomirov, 2017).

Within the scope of this line of research, we can say that the dualism of temporality, placed by Rowlinson et al. (2014), be very illustrative to understand how the authors in their research used the chronology of the facts studied in the archives, to carry out their analysis by historical periods. Although the archives have repeatedly gone through critical interrogations in discourse analysis and interpretative approaches with hermeneutic analysis. Furthermore, we argue that the bold statement by Booth and Rowlinson (2006), that management professionals and academics do not know much about business history, or organizational history does not seem to make any sense today.

Table 1 - Summary of the systematic review by lines of research.

Research lines	Theoretical-Analytical Focus	Care Problems	Contributions	Common limitations / criticisms
<b>On capitalism, business networks, and entrepreneurship</b>	<ul style="list-style-type: none"> <li>- Commercial networks;</li> <li>- Family business;</li> <li>- Institutional arrangements;</li> <li>- Entrepreneurial field;</li> <li>- History of capitalism;</li> <li>- Governance networks.</li> </ul>	<ul style="list-style-type: none"> <li>- Western capitalism development process;</li> <li>- Commercial partnerships that expand the market;</li> <li>- Institutional environment that favors entrepreneurship and commercial expansion.</li> </ul>	<ul style="list-style-type: none"> <li>- Forms of management and business that structure governance;</li> <li>- Market and trade in a comparative focus between countries;</li> <li>- Institutional structures that influenced market integration.</li> </ul>	<ul style="list-style-type: none"> <li>- Central analysis in the western context of Europe and the USA.</li> <li>- Predominance of macro factors as opposed to the micro context;</li> <li>- Lack of comparative studies that show distinctions from regional markets.</li> </ul>
<b>About strategies, investments, and internationalization</b>	<ul style="list-style-type: none"> <li>- Business life cycle;</li> <li>- Chandlerian paradigm;</li> <li>- Multinational companies;</li> <li>- Transactional Commerce;</li> <li>- Foreign direct investment;</li> <li>- Theory of business internationalization.</li> </ul>	<ul style="list-style-type: none"> <li>- Business communities and the list of (de) investments in the market;</li> <li>- Business internationalization and business mutuality;</li> <li>- Are new business strategies the result of altered organizational structures?</li> </ul>	<ul style="list-style-type: none"> <li>- Factors that promote investment and divestment of multinational companies in regional markets;</li> <li>- Organizational capabilities that drive business internationalization;</li> <li>- Companies' life cycle and control of asymmetric information.</li> </ul>	<ul style="list-style-type: none"> <li>- Analyzes excessively focused on "M" companies;</li> <li>- Option for the case study as a research strategy;</li> <li>- Statistical analysis and "T" hypothesis testing as a priority;</li> <li>- Evidence discrepancies in the causal relationship between structure and strategy.</li> </ul>
<b>About regulatory systems and commercial law</b>	<ul style="list-style-type: none"> <li>- Legal systems and financial regulation;</li> <li>- Socio-legal organizations and responsibilities.</li> <li>- Political agenda and market impact.</li> <li>- Business regulation and adaptation.</li> </ul>	<ul style="list-style-type: none"> <li>- Government regulatory pressures on the market.</li> <li>- Legislative system and taxes;</li> <li>- (De)regulation and changes in the behavior of companies;</li> <li>- Regulatory capture and corporate mergers.</li> </ul>	<ul style="list-style-type: none"> <li>- Legislative changes and opportunities for commercial growth;</li> <li>- Regulation and market strategies as competitive advantages;</li> <li>- Convergence between government regulation and business actions.</li> </ul>	<ul style="list-style-type: none"> <li>- Lack of historical analysis between legislative systems in different countries;</li> <li>- Absence of analysis of the effects of regulation on the development of the retail market;</li> <li>- Little attention on company mergers and political-legal influence.</li> </ul>

<b>On historiography, method, and historical sources</b>	<ul style="list-style-type: none"> <li>- Preservation of archives, historiography, and the historian;</li> <li>- Varieties of quantitative and qualitative methods;</li> <li>- Documented history and marginalized issues;</li> <li>- Polyphonic historical studies;</li> </ul>	<ul style="list-style-type: none"> <li>- Archives between neutrality and historical realism;</li> <li>- Commissioned history and methodological implications;</li> <li>- The silence caused by the official archives and the history of marginalized groups;</li> <li>- How to expand the analysis of the past in different versions of history;</li> <li>- Causal relationship between historical events;</li> </ul>	<ul style="list-style-type: none"> <li>- Expansion of the concept of archives beyond textual and official sources;</li> <li>- Various interpretative or statistical approaches;</li> <li>- Transparency in the construction of the argument based on historical sources;</li> <li>- Treatment of data and historical information by researchers;</li> </ul>	<ul style="list-style-type: none"> <li>- Little exchange between qualitative and quantitative methods.</li> <li>- Difficulty in accessing historical data and information;</li> <li>- Weak interdisciplinary engagement between historiographic approaches;</li> <li>- Tendency to anachronism and limited perception of the past.</li> </ul>
<b>On the critical approach, historical narratives and memories</b>	<ul style="list-style-type: none"> <li>- Utilitarian business strategies from the past;</li> <li>- Institutional arrangements and symbolic forms of representation of the past;</li> <li>- Narratives and organizational identity;</li> <li>- The role of history and traditions in organizations.</li> </ul>	<ul style="list-style-type: none"> <li>- Strategic use of memories, narratives, and history in business management;</li> <li>- Characteristics of creating collective identity in the value of the businesses;</li> <li>- Historical narratives and traditions invented as the basis for unequal power relations;</li> </ul>	<ul style="list-style-type: none"> <li>- Benefits of cultural and narrative vision as a historiographical approach;</li> <li>- Increase in interviews as a method of oral history;</li> <li>- Criticizes the utilitarian view of the past and the conscious manipulation of historical narratives;</li> <li>- Memory assets, history, and specific narratives;</li> </ul>	<ul style="list-style-type: none"> <li>- Excessive relativization of the past and history;</li> <li>- Limitations of the oral history approach;</li> <li>- Criticism of scientificity in the elaboration of the argument and empirical evidence;</li> <li>- Wide scope of analytical inferences in research;</li> <li>- Not so clear paradigmatic limits.</li> </ul>
<b>On management, work, and managerial ideologies</b>	<ul style="list-style-type: none"> <li>- Management and Administration as a discipline in education;</li> <li>- Rescue of classic thinkers;</li> <li>- Work organization and management;</li> <li>- Authority and control processes in organizations.</li> </ul>	<ul style="list-style-type: none"> <li>- Changes, differences, and similarities in management in organizations in time and space;</li> <li>- Management practices, organizational problems, and work coordination;</li> <li>- Modernization of management, human nature, and managerial behavior.</li> </ul>	<ul style="list-style-type: none"> <li>- Rescue of assumptions and key concepts in the management and administration area;</li> <li>- Application and limits of managerial ideologies in disparate socioeconomic contexts;</li> <li>- Organizational history, valuation, and knowledge production.</li> </ul>	<ul style="list-style-type: none"> <li>- Analysis method with an excessive focus on the periodization of history;</li> <li>- Strong need to demonstrate the contemporary relevance of information obtained from the past;</li> <li>- Difficulty defining the management area as a clear and unified scientific field of research.</li> </ul>

Source: Elaborated by the authors (2021).

## 5 RESEARCH AGENDA

The historical evolution of capitalism portrayed in the literature still leaves questions about the nature of the market, and as a result, further comparative research is necessary to identify similarities and differences in economic development between nations. For Casson and Lee (2011), they need to be explored in future research: (1) the rate of market development, (2) the impact of institutional arrangements, and (3) competition between business centers. The question raised by Panza, Ville, and Merrett (2018, p. 1) “why do some companies last longer than others?” still needs empirical answers that can be captured from the investment strategies carried out by multinational companies in the business market. In the long run, the diversification of organizational structures and the internationalization process of companies need further research. Therefore, (1) the importance of transactional communities in international economic and political relations and (2) the socioeconomic nature that influences financial investments or divestments, can be points of analysis for future research.

Regarding commercial law and market regulatory systems, some research questions have yet to be under exploration. Therefore, still necessary to know about the investments development, values, and market property based on legislative changes in the civil law economies of Europe, Asia, and Latin America, on the other hand, Burton (2019) suggests that new historical research in secondary sources of archives can help to understand the relationship between economic (de)regulation, the projection of the industrial market and the development of new products. That might be particularly enhanced when we seek to understand (de)regulation from various markets, products, and services in different economic regions of the world. Multiple case studies through comparative history can be feasible methodological possibilities for accomplishing this task.

The questions around “for whom” and “about what” do we write in historical management and business research?”, posed by Śliwa (2013), can safely be used as initial questions in any research project. However, as researchers, we are at the mercy of the unpredictability of access to historical information in empirical research, quantitative methods that might be an adopting choice to analyze and correlate historical facts and data to obtain causality in historical series. Methodological doubts about “what causes what?” are preponderant to discuss economic system, population growth, the survival of companies, or to ponder market decisions, profitability, financial performance, and economic indicators.

On the other hand, dialoguing with the archives and realizing the marginality of existing historical narratives may lead to new research questions and answers on management and business from the vantage point of poverty, gender, ethnicity, and group identities (Decker, 2013). That is a concern of the line regarding the critical approach, historical narratives, and memories. Authors such as Kroeze and Keulen (2013), for example, stressed the importance of the relationship between history and narratives as a possibility for new research in the area that seeks to understand the historical behavior of organizations, the construction of collective identity that arise from management processes and work coordination. Thereby, the doubts raised by Mordhorst (2014) about the creation of historical narratives and what are their main characteristics, still need to be answered, since the way the past, is captured as a rhetorical device appears to be an authentic source for understanding formal limits of organization and broader social practices involving invented traditions, memories and narrative disputes. These narrative disputes are also reflections of power relations. Therefore, as the story commonly told favors particular narratives to the detriment of other ones about the past and to get the picture of why the neglect and historical silences caused, they are still relevant to be done (Decker, 2013).

In the line of research regarding management and managerial ideologies, Head (2011) suggested that revisiting the founding principles of any scientific field of knowledge is an ongoing task that needs to be performed. That can be important for the management area, in which returning to historical roots is an exercise not done with such constancy. Cristofaro (2017) recommended new researches, on human rationality based on the proposal of Herbert Simon, which embraces the impacts of the relationship between limited rational forces and irrationality in the organizational work environment. Tikhomirov (2017) also left questions to be answered regarding scientific administration and the principles of Taylorism. It is not yet clear how the production organization system and human work, based on the managerial logic of Taylorism, had implications for different socioeconomic and cultural systems. Besides, how the work organization process, business strategies, and production management are related might be analyzed over time. Controversial questions about what the foundations of modern management are and how the philosophical premises implied in the concept of management are still open to answers.

## **6 FINAL CONSIDERATIONS**

The main objective of this article is to carry out a systematic review of the literature on business history and management in specialized journals between the period 2011 to 2020. The central premise of this article, which is that the understanding of the theoretical-methodological decisions of researchers, helps to understand the historiographic approaches chosen, was well accepted and answered. In the introduction to the article, we asked what were the epistemological positions and theories used by the authors in their research. In response, from the analysis carried out, we suggest that in terms of epistemologies and theoretical framework, when researchers were concerned with understanding the relationship between cause and effect of economic phenomena and the behavior of companies in multinational markets, it was the economic theories of capital and governance, Chandlerian paradigm, dependence on the path, a view based on resources and (de)investment strategies that proved to be the privileged theoretical choices. If the researchers' concern was to conduct broad social analyzes between society, government, and the market, then the legal theses, socio-legal theory, institutional theory, co-regulation theory, mergers, and business co-optation were the priority areas of thought. When researchers understood the past as a place of power disputes, we can say those narrative theories, cultural approach, critical discourse theory, ANT-history, and the actor-network theory proved to be the main choices.

We also asked a second question to comprehend how these epistemological and theoretical choices of the authors defined their methodological decisions. In general, concerning epistemological positions and theoretical relations that sought to understand economic causality, business performance strategies, business, and financial profitability, we argue that methodological decisions favored statistical data and tabulation in historical series, through correlation analyzes, hypothesis tests, and mathematical regressions. If the researchers were using institutional theory, the life cycle perspective of companies, and corporate governance for example, then it was the case studies in the corporate archives that were the qualitative methodological choices selected. Besides, when researchers used narrative and discursive theories from the oral history method to answer their research problems, recurrently, in-depth interviews and analyzes of critical discourse and hermeneutics were the methodological choices made.

Finally, the possible limitations of this SLR may be in the methodological decision to analyze only articles from specialized journals and the period that privileged the recent production of knowledge. Thereby, future research can deepen the scope of articles analyzed in databases such as

Web of Science, Scopus, and Google Scholar from a more extensive period of scientific production. Linked to this, the mapping in future research on the profiles of authors, institutions, and research groups to which knowledge production is concentrated can better demonstrate the institutional behavior of this specialized research field in the area of business history and management history.

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## AUTHORS

### 1. Ítalo da Silva

Universidade Federal de Pernambuco, Recife, Pernambuco, Brazil.

Master's student at the Graduate Program in Management, Innovation and Consumption of Centro Acadêmico do Agreste by Universidade Federal de Pernambuco (PPGIC/CAA/UFPE).

E-mail: italohenriquedefreitas@gmail.com

ORCID: <https://orcid.org/0000-0003-4489-1389>

### 2. Elisabeth Cavalcante dos Santos

Universidade Federal de Pernambuco, Recife, Pernambuco, Brazil.

Professor at the Graduate Program in Management, Innovation and Consumption of Centro Acadêmico do Agreste by Universidade Federal de Pernambuco (PPGIC/CAA/UFPE). PhD in Administration by Universidade Federal da Paraíba (UFPB).

E-mail: elisabeth.csantos@ufpe.br

ORCID: <https://orcid.org/0000-0003-3133-7290>

## Contribution of authors

Contribution	[Author 1]	[Author 2]
1. Definition of research problem	√	√
2. Development of hypotheses or research questions (empirical studies)	√	√
3. Development of theoretical propositions (theoretical work)	√	-
4. Theoretical foundation / Literature review	√	-
5. Definition of methodological procedures	√	√
6. Data collection	√	-
7. Statistical analysis	-	-
8. Analysis and interpretation of data	√	-
9. Critical revision of the manuscript	√	√
10. Manuscript writing	√	-
11. Supervision	-	√

## Conflict of Interest

The authors have stated that there is no conflict of interest.

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