

USING HISTORICAL CONTEXTUALIZATION TO ADDRESS SOCIETAL GRAND CHALLENGES

Routine calls for more, and better, contextualization abound in management research (Bamberger, 2008; Ghoshal and Bartlett, 1994; Stahl, et al., 2023; Welch, et al., 2022). For academic researchers, thin contextualization has been critiqued for generating thin theory with limited explanatory power (Jackson, et al., 2019; Teagarden, Von Glinow, and Mellahi, 2018). For students and practitioners, rich contextualization has been identified as a means of enabling managers to wrestle with ambiguous, complex, multicausal circumstances (Brokerhof, et al., 2023; Holm and Islam, 2024). Indeed, it is increasingly commonplace in management studies to insist that contextualization, as a research method and as a managerial capability, is essential for confronting the socioecological “grand challenges” of our time (Hanisch, 2024; Van der Byl, Slawinski, and Hahn, 2020).

Yet rarely is *historical* contextualization addressed as a specific means for addressing societal grand challenges. This is surprising, given that the professional discipline of history is methodologically equipped to deal with contingency and variations in context, arguably better than any other discipline (Gadamer, 2004; Hoffer, 2008; Tilly and Goodin, 2006). Furthermore, professional historians are trained to use specific techniques for thinking systematically about wicked problems, often at a much larger temporal and / or geographical scale than most social sciences are prepared to

tackle given the limits to generalization from incomplete evidence (Gaddis, 2002). In this paper we seek to review the current state of theory on contextualization in management studies, demonstrating how drawing on theory and methods from historical studies can advance an agenda for applying historical contextualization to grand challenges. In doing so, we build on recent work urging historians of business and management to move beyond the “uses of the past” and “rhetorical history” approaches (Argyres, et al., 2020; Lubinski, 2018). Although such work has usefully reminded management scholars that “history matters,” its limited range of engagement with historical theories and methods has constrained the very rich opportunities provided by multiple modes of historical contextualization for developing more robust theories and concepts of management in an era of “polycrises” (Tooze, 2022).

In particular, we argue that historical contextualization enables two interrelated capabilities relevant to theorization across a broad swath of management research: first, a capacity to robustly identify the most important causal elements in complex, multicausal social circumstances; and second, a capacity for understanding the role of intersubjectivity in explaining otherwise inexplicable social or organizational outcomes. We proceed by addressing how contextualization and grand challenges have been addressed in mainstream management studies to date, assessing strengths and shortcomings in existing approaches. We then draw upon recent work in historical entrepreneurship theory and business history to point to pinpoint theoretical and

methodological considerations most relevant to grand challenges. Finally, we briefly explore three examples using historical contextualization to demonstrate potential for addressing grand challenges in strategic management, international business, and in supply chain management.

CONTEXTUALIZATION AND GRAND CHALLENGES IN MANAGEMENT STUDIES

Context is, of course, everything, for no text, event, concept, or theory makes sense when divorced of its context. Management scholars know this and have been calling for decades for better application of context theories and methods of contextualization to management research (Bamberger, 2008; Ghoshal and Bartlett, 1994; Jackson, et al., 2019; Stahl, et al., 2023). Such calls became more urgent in the wake of the global financial crisis of 2008-2009, which led among other things to a 2011 Carnegie Foundation report (“Carnegie II”) on the state of business schools, which called for future managers to be trained in liberal arts methods of contextualization to promote more ethical business practices (Colby, et al., 2011). In the wake of Carnegie II, it has become increasingly routine for management scholars to challenge the epistemological assumptions of the idealized business school research agenda of the Cold War period, when “Carnegie I” (Pierson, 1959) and the Ford Foundation demanded research that generated parsimonious models and universalist theories (Khurana, 2007; Steyaert, Beyes, and Parker, 2016). The positivist management theories of the Cold War era may have been useful for vertically integrated corporations seeking

to position themselves for supranormal profits, but are now increasingly dismissed as unhelpful at best for addressing wicked societal challenges – “polycrises” (Tooze, 2022) – that require fresh thinking on organizational strategy, behavior, governance, and ethics (Ghoshal, 2005; Hanisch, 2024). Contextualization is widely acknowledged as essential for moving beyond positivist parsimoniousness, enabling management researchers and future managers to engage with the complicated challenges of our time with greater empathy, with theories better attuned to the lived experiences of individuals working in organizations confronted by profound uncertainty (Berti, et al., 2020; Brokerhof, et al., 2023; Holm and Islam, 2024; Kurtmollaiev, et al., 2018; O’Doherty, 2020).

Two domains of management research in which explicit links have been made between contextualization and grand challenges are systems thinking and paradox studies. Systems thinking insists on the interconnectedness of phenomena, such that any attempts to reductively analyze the system as composed of discrete components loses the unbreakable interrelationships that characterize the system (Jackson, 2019; Williams, et al., 2017). Within organizations, a systems approach thus enables what Werhane (2002) labeled “morally imaginative sensemaking,” a process by which organizational actors both immerse themselves in a context and then disengage themselves from it, gaining multiple levels of perspective on complicated social relationships that enable empathic decision-making (Hargrave, et al., 2020). Beyond the

organization, systems thinking has been touted as “the only appropriate response to complexity” (Jackson, 2019: p. 19), and thus especially apt for addressing “wicked problems” in which causality runs in multiple directions simultaneously (Grewatsch, Kennedy, and Bansal, 2023). Although historically systems theory has been taken up mostly by operations management researchers (Jackson, 2009), increasing attention has been paid in recent years to how systems theory can support richer understanding of, and pragmatic action on, organizational strategies for promoting environmental sustainability (Ferraro, Etzion, and Gehman, 2015; Garnett, 2018; Williams, et al., 2017).

Paradox studies likewise treats context and contextualization as foundational to its theoretical constructs. Similarly to systems theory, paradox studies takes multidirectional causality as a given rather than an aberration. Because of this, paradoxes are not mere tensions or conflicts, for they are contradictory yet also complementary; unlike tensions, conflicts, or dialectics, paradoxes cannot be resolved and thus last for long periods of time (Farjoun, 2010). Paradoxes are inherently unresolvable, rooted in mutually constitutive contradictions, and as such can reveal much about the power relations embedded in business dynamics (Cunha, et al., 2021). Paradoxes are furthermore situational and contingent, demanding methodological approaches that “enable contextual richness” to understand why some organizational contexts are more prone to paradox than others (Smith and Lewis, 2011: 397). Despite the challenges of understanding paradoxes across organizational boundaries,

methodologies for rich contextualization (including “zooming in and out”) have been promoted by paradox scholars as especially well-suited to tackling “grand challenges” (Jarzabkowski, et al., 2019; Van der Byl, et al., 2020). As Berti, et al. (2021: p. 119) suggest, the paradox approach to “zooming out” can reveal the large-scale contexts in which grand challenges operate, while “zooming in” reveals the modes by which organizational actors must make choices even when their agency is tightly constrained. In a world in which “wicked problems” or “polycrises” simultaneously demand solutions yet cannot be solved, paradoxes abound and clearly merit further research and theorization.

Yet it is striking to note that both systems theory and paradox studies, despite decades of work insisting on the value of contextualization, generally ignore historical research or methods. Systems theory often explicitly rejects historical analysis, on the premise that “the past is an unreliable predictor of the future” (Grewatsch, et al., 2023: p. 8). Paradox scholars, by contrast, have repeatedly recognized the value of historical methods for exposing how paradoxes develop over time and either do or do not attain states of “dynamic equilibrium” (Clegg, Cunha, and Cunha, 2002; Smith and Lewis, 2011). Yet despite repeated calls for longitudinal analyses of the evolution of paradoxes (Andriopoulos and Lewis, 2010; Berti and Cunha, 2023; Berti, et al., 2021; Fairhurst and Sheep, 2019), only a handful of paradox studies have to date actually used longitudinal

analysis to refine paradox theory (Hamilton and Godley, 2024; Jarzabkowski, et al., 2022; Silva and Neves, 2022).

Meanwhile, business and management historians have in recent years made compelling arguments for the incorporation of historical methods into management studies. The value of contextualization is arguably the strongest claim that historians can stake in the ongoing effort to enrich management theory. The toolkit that historians bring to bear on complicated social and organizational dynamics is inherently predicated on rich contextualization. As demonstrated in extensive empirical and theoretical work in entrepreneurship studies, for instance, historical approaches to contextualization are particularly helpful for helping researchers understanding otherwise difficult-to-explain phenomena (Lippmann and Aldrich, 2016; Maclean, Harvey, and Clegg, 2016; Wadhwani and Viebig, 2021; Wadhwani, et al., 2020; Welter, Baker, and Wirsching, 2019; Zahra and Wright, 2011).

Furthermore, historians approach contextualization with a multitude of carefully crafted methods, reflectively developed with an awareness that historians must confront an epistemological quandary of contextualization. This quandary is highlighted by the work of historical philosopher Wilhelm Dilthey, who proposed that every human action or thought only gained meaning “through its relationship to the totality of its epoch or age” (Mitrović, 2015, p. 312; cf. Dilthey, 2002). Radical contextualism—the view that context determines all possible social meanings—would

prevent us in the present from fully understanding a concept or event from the past unless we share exactly the same worldview. Yet if all contexts are shared across time, contextualization cannot explain change over time (Lawson, 2008; Mitrović, 2015).

Historians typically address this quandary by “zooming in and out” via reading a large volume of primary and secondary sources, considering the changing nature of language and the interplay between structure and agency in order to make sense of any given text (Decker, 2023; Lipartito, 2014; Rowlinson, 2004). Rather than use computer-aided text-mining to perform “distant reading” by breaking up huge volumes of text into discrete units (Moretti, 2013), most historians approach their reading in an analog fashion, much as the optical zoom on a camera lens allows a photographer to focus and refocus at differing distance from a subject with no absolute division at any point between the close and the distant perspective. This analog approach to “zooming in and out” has been highlighted by Gaddis (2002) as a core capacity of the methodologically sophisticated historian. There is a metonymic function of such scale-shifting; the part can be used to take the place of the whole, making the more easily described particular instance stand in for the larger and more complicated general structure or trend (Hargadon and Wadhwani, 2023). But beyond this, the historian’s capacity for zooming in and out in an analog fashion—that is, nearly simultaneously holding the object of study in close focus and also approaching from more distant perspectives—can provide “a new angle of vision into the past” (Gaddis, 2002: p. 26).

To date, however, the rich methodological and empirical contributions that business and management historians have made to contextualization have been directed primarily at specific questions derived from management subdisciplines (such as entrepreneurship and strategy). If, however, we take seriously the calls from management studies—including systems thinking and paradox studies—for applying contextualization as a means of pragmatically addressing “grand challenges,” then we suggest the time is ripe for business and management historians to deploy their toolkits for doing precisely this. Rather than focusing on demonstrating “dual integrity” as historians contributing to a specific subfield of management studies (Maclean, Harvey, and Clegg, 2017), we argue that historical contextualization should be adopted more widely across multiple subfields and disciplinary boundaries in management studies. This is because, as we and others have begun to argue elsewhere (Cavanagh, et al., 2023; Godley and Hamilton, 2020; Hamilton and Godley, 2024), historical contextualization underpins two important capabilities that are especially relevant to generating pragmatic action for addressing grand challenges: namely, a capacity to pinpoint the most important causal elements in multicausal, temporally durable settings; and second, a capacity for appreciating the role of cognitive malleability among organizational actors confronting “hard” structural limits to their agency.

As an initial entrypoint in developing our conceptualization of cross-disciplinary historical contextualization in response to grand challenges, we next offer three brief

examples related to strategic management, international business, and supply chain management.

HISTORICAL CONTEXTUALIZATION IN STRATEGIC MANAGEMENT

Few fields in management studies have devoted more attention to structure than strategy and strategic management. The influence of the so-called “design school” of strategy, including the contributions of business historian Alfred Chandler (including the still-influential book *Strategy and Structure* [1962]), has left an enduring legacy on the field. As originally conceived by design school strategic theorists such as Kenneth Andrews, the core task of strategic management was to devise organizational structures that provided the best “fit” between internal capabilities and the external environment (Mintzberg, 1990). Criticisms of the assumptions of the design school have abounded for years, directed for instance at the premise that strategy determines structure (rather than vice versa), and at the de-contextualizing oversimplifications of the SWOT analysis tool closely associated with the approach (Burgelman, et al., 2018; Hill and Westbrook, 1997). The continuing attention to such debates reveals an important quandary (or even paradox) at the heart of strategic management: are organizational structures determinative of, or determined by, the contexts in which they come to be, endure, and fade away? Strategic management’s attention to *structure* is therefore rooted in interrogations of both temporality – change or stasis over time – and causality.

Scholars of industry architecture, for instance, tend to emphasize the structural constraints imposed on individual firms by the passage of time, seeking to reveal causal forces residing at a higher level than any one person or organization can perceive at a given point in time (Argyres and Bigelow, 2009; Fixson and Park, 2008; Jacobides, 2005; Jacobides and Winter, 2012; Pisano and Teece, 2007). Yet with explanatory elegance comes the high cost of determinism. Constructing a linear, outside-in history of an industry's architecture requires minimizing the agency of individuals and the contexts in which individual choices were made—including the prehistories of the people, firms, industries, and markets that may have influenced the paths eventually followed (Helfat and Lieberman, 2002; Sydow, Schreyögg, and Koch, 2009; Welter, 2011). Embedding causality in structural “forces” beyond the control of individuals can provide explanatory power in hindsight for scholars. Yet for individuals actually experiencing historical change, the implication is that their choices are insignificant. Such approaches to the contexts in which strategy and structure interact, then, provide little in the way of pragmatic possibility for addressing the grand challenges of the present and future.

Business and management historians address historical contextualization differently in assessing the relationship between strategy and structure. For one, historians reject a simplistic rendering of historical time as linear or merely chronological. For historians, time does not proceed smoothly along, but instead appears to be “eventful” (Decker, 2022), less a ruled line than a set of punctuation

marks, with the relationship between various events not necessarily causal, and with each individual event potentially laden with great significance and meaning (Dew, 2009). Organizational actors thus devise strategies as well as structures in dynamic response to their own constitutive understanding of their “place” in time, not as a fixed determinative point but as a means of moving forward in the face of uncertainty (Wadhwani and Lubinski, 2017; Zundel, Holt, and Popp, 2016).

As Godley and Hamilton (2020) have demonstrated in a comparative historical analysis of the UK and US poultry sectors, an approach to historical contextualization that navigates between the poles of deterministic causality and unconstrained individual agency provides a means of pinpointing the *most important* causal factors that produced, in this case, divergent strategic outcomes regarding willingness to participate in strategic alliances. This is because, on the one hand, a mode of historical contextualization that is attuned to structurally determinative factors helps narrow down the range of possible strategic choices available to organizational actors. In the case of US vs. UK poultry, the comparative method demonstrated profound similarities between technological knowledge and market structures. Although comparative analyses of other industries might have revealed important distinctions, in this case the structural comparison ruled out these factors as significant causal explanations. By contrast, attention to the cognitive, emotional concerns of organizational actors, as exposed in a range of oral history interviews, demonstrated that poultry producers in

the two countries had dramatically differing understandings of how past experiences (of the Great Depression and of World War II) shaped the range of choices available to them in the postwar period.

For strategy scholars seeking to understand appropriate responses to grand challenges, we suggest that such robust approaches to contextualization would prove very fruitful. Rather than assuming that the past is inert and therefore an unreliable predictor of the future as systems thinking would have it (Grewatsch, et al., 2023), an approach to the past that recognizes it is always being interpreted as living history, including by organizational actors confronting uncertainty, can support an enabling rather than merely determinative worldview.

HISTORICAL CONTEXTUALIZATION IN INTERNATIONAL BUSINESS

Recent contributions to the international business (IB) literature have repeatedly emphasized the importance of historical research (Buckley, 2009, 2021; Burgelman, 2011; Jones and Khanna, 2006). Historical research enables, among other things, testing the relevance of theories in multiple situations and better modelling real-world applicability (Buckley and Casson, 2021; da Silva Lopes, et al., 2019). Calls for historical approaches to IB thus routinely echo appeals for “thicker” contextualization to develop more robust and more widely applicable models of internationalization processes (Corner, et al., 2021; Doh, 2015; Jackson and Deeg, 2008, 2019; Nielsen, et al., 2020;

Welch, et al., 2011, 2022). Despite the persistence of such calls, historical context is nonetheless routinely treated in IB as a unitary object or a “backdrop” that preconditions or determines the present and future, with historical time conceived of as a linear accumulation of events (Lubinski, 2018; Verbeke and Kano, 2015; Welch and Paavilainen-Mäntymäki, 2014).

However, this treatment of historical context within IB is flawed, primarily because the assumption of the linear flow of time prevents serious consideration of how unpredictable, nonlinear events lead to changes in the historical context. Such “watershed” moments, recognized by historians as dividing points between one historical period and the next, can produce fundamental transformations in political institutions, economic environments, technological capabilities, cultural values, linguistic meanings, and in individual and organizational behavior (Athreye and Godley, 2009; Decker, 2022; Fear, 2014; Messina and Hewitt-Dundas, 2023; Sewell, 2005; Zerubavel, 2004). IB scholars recognize the importance of multiple types of context in their analyses (Corner, et al., 2021; Scott-Kennel and Saittakari, 2020), but there has been no study that systematically interrogates how nonlinear transformations in context have historically conditioned any key feature of the internationalization of business.

When IB scholars do incorporate historical time into their research designs, they tend to do so in one of three ways. One is history as “backdrop” or “setting the stage” for the analysis (Lubinski, 2018). This can take the form of asserting that there is a

growing trend of a given IB phenomenon, either by asserting a specific starting point for analysis or by broadly referring to a generic past when the context was broadly different (Björkman, et al., 2008; Bohnsack, et al., 2021; De Beule and Van Beveren, 2019; Drogendijk and Martín, 2015). A second invocation of history is similarly linear in its ontology of time, viewing the past as an accretion of events or resources (e.g., knowledge, managerial expertise) or an evolution of capabilities, generally over a tightly constrained time period of around 10 years (Achcaoucaou, et al., 2014; Cavanagh and Freeman, 2012; Ha and Giroud, 2015; Nuruzzaman, et al., 2019; Park and Chung, 2019; Teodorescu, et al., 2022). A third approach is to view history as a “burden” for a MNC, e.g., that prior to a certain time period, the firm lacked access to relevant expertise, technology, or institutional support (De Clercq, et al., 2010; Niittymies, 2020). Such approaches to historical context are useful in that they can make time into a unit to be measured, a variable to be tested. They fail, however, to explain why and when fundamental transformations in historical context do not merely “set the stage” for what events happen next, but instead build a new theatre, where all the actors’ scripts may need rewriting (Buckley, 2021; da Silva Lopes, et al., 2019; Decker, 2022; Jones and Khanna, 2006; Lubinski, 2018; Welch, et al., 2022)!

Historians’ understanding of historical context emphasizes how specific human activity is deeply influenced by “dependencies and references” within the local environment (Nicolini, 2009: 1410). When these are disrupted through some

unprecedented event, then behavior can change. Consideration of the specific *mechanisms* that produce nonlinear transformations allows for systematic causal explanation while avoiding the shortcomings of overly parsimonious positivism. Tilly and Goodin (2006) define such mechanisms as events “that change relations among specified sets of elements in identical or closely similar ways over a variety of situations” (p. 12). Mechanisms that can be seen to produce similar rearrangements across multiple contexts can be identified as robust in explanatory terms. When identified through careful historical interpretation, such mechanisms can be grounded in awareness that contexts can change dramatically over time and space. Three broad classes of mechanisms for social change can be identified: environmental, relational, and cognitive. The former two serve as objective, structural mechanisms, while the latter is subjective. All three offer means of explaining why broadly uniform outcomes might result from entirely incomparable initial conditions (Tilly and Goodin, 2006).

Determining where one context ends and another begins, and which specific mechanism(s) produced the change, thus becomes the essential task for both explaining a significant social phenomenon and for interpreting its consequences (Decker, 2022; Gaddis, 2002; Lawson, 2008; Mahoney and Schensul, 2006). This produces the deeper, “thicker” analyses that historical studies is renowned for: overcoming the temporal distance between the researchers and researched (Decker, 2022), identifying those

causal factors which transcend changes in historical context, while isolating those mechanisms which are context-specific.

Our analysis of a large-scale database (Godley and Fletcher, 2002) of the historical population of subsidiaries in UK pharmaceuticals, for instance, has revealed evidence to counter the prevailing assumption in the IB literature that competence-creating subsidiaries emerged only sometime around the 1980s (Behrman and Fischer, 1980a, 1980b; Papanastassiou, et al., 2020; Ronstadt, 1978). Although mainstream IB theory on competence-creating subsidiaries adequately explains patterns in UK pharmaceuticals from the 1980s onward, those theories do not explain the emergence of competence-creating subsidiaries in the period from 1945 to 1963. Instead, we explain the rise of such subsidiaries as a response to a nonlinear transformation in context: the creation of the National Health Service (NHS) in 1948. The NHS introduced a dramatic change in the structure of the market for pharmaceuticals after the war. This structural change occurred in two overlapping stages, the first involving an environmental mechanism of *restriction* (related to efforts to rein in the spiralling costs of prescriptions), the second a relational mechanism of *negotiated gatekeeping* (related to pharmaceutical firms restructuring their R&D and marketing efforts to target centralized clinical researchers in the NHS, rather than decentralized doctors in hospitals).

Treating historical context not as a “stage” or “backdrop,” we contend, thus enables a more effective means for IB scholars to consider the future role of multinational firms in addressing the uncertainties and complexities of grand challenges. This is because, on the one hand, currently dominant IB theory is overly tied to empirical evidence and assumptions rooted in a remarkably constrained period of time in human history, namely the late 1980s to the first decade of the 21st century. And on the other hand, as a growing chorus of IB scholars has begun to argue, the concept and phenomenon of the international subsidiary may be in the process of becoming increasingly irrelevant in the contemporary business environment (Andrews, et al., 2023; Edwards, et al., 2022; Lim, et al., 2017; Meyer, et al., 2020). The catalyst to this debate has been the recognition that MNC behavior is changing in response to the recent convergence of major, nonlinear transformative events in the wider business environment. These include political (such as increasing trade barriers), technological (such as continuing reductions in the costs of communications), biological (such as pandemic induced restrictions on movement), and institutional disruptions (such as the U.K. departure from the European Union). The increased environmental complexity of conducting international business has led to changes in patterns of subsidiary behavior. These changes in behavior currently remain somewhat opaque to IB scholars (Meyer, et al., 2020), but to historians appear similar to changes witnessed in the past. It follows that just as IB scholars are debating the future validity of current theories about

subsidiary behavior as the global economy undergoes substantial transformations, so we should also extrapolate backwards and assess whether current theoretical explanations are equally valid in earlier historical periods. In so doing, we propose that researchers and future managers in international business would be better prepared to address the emergent contingencies of a world beset by polycrises.

HISTORICAL CONTEXTUALIZATION IN SUPPLY CHAIN MANAGEMENT

Although a veritable “historic turn” has taken root in many fields of management studies, historical approaches to supply chain management are exceedingly few and far between. As a field, supply chain management may be the most future-oriented field in business and management studies. The vast bulk of research in the field has little or no historical content. Between 1994 and 2022, the top 15 journals in the field published 38,510 research articles. Of those, only 139 (0.36 per cent) included any variation of the words “history” and “supply chain.”¹ Most of the articles that include the keyword “history” or “historical” do not include any contextualized analysis of past events in the sense that historians would understand as authentic, even

¹ The “top 15” journals in the field are those identified by Andreas Wieland, associate professor of supply chain management at Copenhagen Business School, on his blog “Supply Chain Management Research” ([SCMresearch.org/tag/ranking](https://scmresearch.org/tag/ranking)). The rankings are determined by the Association of Business School’s *Academic Journal Guide* (“the ABS list”). The literature search was performed on Web of Science, first searching across all 15 journal publications titles, filtered by items of type “Article” (e.g., excluding reviews, editorials, news items). That search was then refined to search within all fields for “hist*” and “supply chain.” The full final query can be viewed at: <https://www.webofscience.com/wos/woscc/summary/e8319195-bb33-4957-b2e3-c69795eb0ad2-35c3632f/relevance/1>

if one expands the literature search to include general business and management journals. For instance, references abound to “historical performance,” e.g., a time-series dataset of a firm’s return on assets. Some include the word “historically” in the abstract merely as a throwaway introductory term, with no historical content or analysis present in the article itself. Still others use “history” in the sense developed within the Resource-Based View (RBV), which theorizes that strategically valuable organizational resources develop over time, but without actually analyzing how those resources developed over time. As two historically sensitive management scholars have argued, the field of supply chain management is “inherently future-oriented” (Bunninge and Fridriksson, 2017). Problematically, by *disowning* or *selectively interpreting* the past of supply chains, management researchers and teachers promote a linear and deterministic conceptualization of time.

“Disowning the past,” as Hamilton and D’Ippolito (2022) have argued, is an intentional process of erasing history, not a means of merely forgetting. Disowning acknowledges the existence of past events, yet refuses to recognize past actions, events, or knowledge as relevant to future decisions. The past becomes a problem that must be removed from present-day collective memory. The process of disowning supply chains history is perhaps most evident in the teaching of undergraduate and graduate students in supply chain management. Several systematic analyses of supply chain management and logistics courses in multiple countries reveal that in hundreds of syllabuses, there is

no content explicitly labeled as historical. Most such syllabuses include a week of “introduction” that may or may not include historical content (Birou, Lutz, and Walden, 2022; Lutz and Birou, 2013; Lutz, Birou, and Walden, 2021). In a remarkably common trope, the only history in some textbooks is a line or two in the introduction declaring that logistics and supply chains have mattered since the construction of the Egyptian pyramids and the empire-building of Roman armies (Chopra and Meindl, 2013; Martin, 2016; Simchi-Levi, Kaminsky, and Simchi-Levi, 2000). As Dana Orenstein (2019) has noted in her history of American warehouses, the “ancient history” trope is intended primarily to promote a universalized sense of historical authenticity without actually diving into the messy details and contingencies of change over time.

Perhaps most problematic are the texts which seek to mark out the boundaries of the field of supply chain management by explicitly disowning the past as a problem. This primarily takes the form of a declaration that prior to the 1980s, business managers simply could not conceive of integrated supply chains. Take one of the few textbooks in the field that has a substantive history section in its introductory chapter (Rushton, Croucher, and Baker, 2014). *The Handbook of Logistics and Distribution Management* insists that in the 1950s and 1960s, “distribution systems were unplanned and unformulated” and only “some way or other” did goods reach consumers. It was not until the 1980s that “forward-looking companies” recognized the possibility of using information technologies as well as physical distribution technologies to develop “an effective

logistics strategy.” Generally the failure of past would-be supply chain managers is attributed to a compartmentalized focus on cost reduction in purchasing, production planning, and inventory planning, rather than a more strategic view of entire supply chains as producers of value. As one historical review puts it: “until the late 1990s, the possibility that revenue gains or returns on assets could come from supply chain activities hardly crossed their minds” (Autry, 2021). From such a perspective, history is more than useless, it is a burden, for in “today’s hyper-dynamic environment” the only path to success is to “constantly seek to implement innovative but risky and unproven initiatives” (Autry, 2021).

Disowning the past thus poses an ethically disturbing epistemological claim: perhaps supply chain managers *can* know the past, but they *should* not, for lurking in the past are non-innovative ideas. Yet as such hyperbole suggests, disowning the past is a very difficult act to get away with. As a process of intentional rejection of past events that may have been formally documented, disowning might have the unintentional effect of making the past not forgotten but “remembered only too well” (Hamilton and D’Ippolito, 2020).

Selectively interpreting the past provides an alternative mode to disowning, though with a similar outcome for inculcating supply chain managers with a linear conceptualization of time. Selective interpretation is a concept generally familiar to historians as something we try hard to avoid lest we be deemed lacking in objectivity

(Hoffer, 2008; Novick, 1988). Yet selective interpretation of the past is often used intentionally in the business and management world as a means of strategically communicating with stakeholders (Brunninge, 2009; Suddaby, Foster, and Trank, 2010; Wadhwani, et al., 2018; Zundel, et al., 2016). In the intellectual world of supply chain management, selective interpretation often lays out the history of supply chains as a series of stages, each following the other in a predetermined fashion. In these selective readings of supply chain history, the key message—to students and to practitioners—is that the “evolution” of supply chains is teleological, always progressing to a higher plane of efficiency.

Much more common than the “old as the pyramids” trope in supply chain textbooks is the invocation of Wal-Mart as the organization that did more than any other to model the future of global supply chains. “Wal-Mart has been a leader in sharing information and collaborating with suppliers to bring down costs and improve product availability,” states one textbook, adding that “the results are impressive” (Chopra and Meindl, 2013). Wal-Mart’s supply chain management techniques are routinely upheld as a model for other organizations—not just its initial successes, but its ongoing achievements in the early 21st century. Textbooks regularly offer Borders as the counterpoint to Wal-Mart, noting that the chain bookseller rose to prominence in the U.S. in the 1990s but then failed to successfully “adapt supply chains to a changing environment” (Chopra and Meindl, 2013). The success of Wal-Mart has led at least one

supply chain management researcher to develop a reasonably robust historical analysis of the firm's buyer-supplier relationships, based on primary research including "field notes and industry interviews" and "company reports, Compustat queries, trade reports, and surveys" (Hansen, 2009). At nine pages in length, the results of the historical analysis may seem slightly thin to a professional historian, but the point here is that few firms other than Wal-Mart are likely to get a single page of historical treatment in a supply chain journal, let alone nine.

Selective interpretation of the past not only entails that just a handful of firms are upheld as models for the future, but also that the contextual factors to be considered as important in shaping the development of supply chains are quite constrained. For instance, regulatory policy is generally treated in supply chain research as a burdensome problem of the past, rather than the outcome of decades of electoral political battles, mass movements by farmers and workers and consumers, and ideological conflicts in democratic governance. Representative of this approach is one textbook's "good example" of the benefits of deregulation for FedEx, which was "constrained by burdensome government regulations in the United States in the 1970s" but after airline deregulation "was able to expand and grow" (Mangan and Lalwani, 2016). Selective interpretation frames government regulation as a problem for supply chain managers, whereas more robust historical analyses might consider the possible benefits of regulation both for anchor firms and for other stakeholders, such as

unionized employees or consumers unable to individually inspect the social or environmental harms embedded in supply chains. Supply chain theorists also routinely acknowledge that poor labor conditions in global supply chains have, in the past, posed reputational risks to lead firms, as with the impact of the child labor scandal on Nike in the 1990s and the similar results of the 2013 Rana Plaza disaster for major multinational fashion brands. Rather than being considered constitutive examples of the social harms embedded in contemporary supply chain practices, Nike's child labor episode and Rana Plaza are selectively upheld as examples of how organizations can learn to manage their supply chains (and reputational risks) even better: "Fashion brands' practices and organization, international standards and NGO campaigns have greatly evolved since the Nike scandal days" (Khurana and Ricchetti, 2016). (The International Labour Organization, meanwhile, notes that at least 109 accidents have occurred in Bangladeshi textile factories since Rana Plaza, leading to at least 27 deaths [International Labour Organization, 2023]) .

Selectively interpreting the past furthermore enables radical compressions of time. Professional historians also compress and distort time, sometimes radically, when we periodize history for analytical purposes (Ricoeur, 2004; Zerubavel, 2004). When supply chain theorists compress time, however, they do so in a strictly linear fashion. Complex events, technologies, organizational and institutional relationships, and ideas are tersely summed up as "Supply Chain 2.0" or "3.0." A key text in this stream of

literature (cited more than 4300 times since 2019) presents the “supply chain 4.0 strategy path” as an upward trending arrow. At the “initial stage,” “disruptive technologies [are] not implemented,” while at the “cutting-edge stage,” disruptive technologies are not only in use but “evolving,” with all “processes digitized” (Frederico, et al., 2020: p. 276). This constrained presentation of historical development is explicitly intended as a user manual, to provide “frameworks to provide assistance in the formulation and deployment of Supply Chain 4.0 policies and strategies” (Frederico, et al., 2020: p. 277).

The problem with teleological approaches to historical interpretation is that real-life events often throw a wrench in the works, disrupting the presumed path to progress. In supply chain theory, however, even setbacks are generally subject to selective interpretation, as with the apparent consensus that the 9/11 terrorist attacks and the 2008-2009 global financial crisis spurred the development of new theories of supply chain resilience (Linnenluecke, 2017). A less selective interpretation might have suggested that those major events revealed systemic *fragility* in contemporary supply chains. What then, might supply chain theorists learn from historical approaches that neither disown nor selectively interpret the past?

First, whereas supply chain theorists begin with abstractions and assumptions, historians start with questions. The historian’s inductive approach may not be as “logically rigorous” as the deductive methods prized by operations researchers and engineers, but as one pair of supply chain theorists has noted, the assumptions needed

for deductive analysis “often fail to capture many features that are relevant in the real world” (Helper and Sako, 2010). Take for example Nelson Lichtenstein’s (2017) history of the concept of “supply chain management” in a book chapter giving “two cheers” for a bygone era of vertically integrated firms: rather than beginning with the consequences of the “logistics revolution” for the profitability of firms, Lichtenstein begins with the consequences for workers, consumers, and above all, the structures of democratic governance in an economy driven by giant multinational retailers. Rather than assuming that what’s good for Wal-Mart is good for America, Lichtenstein’s work illustrates that Wal-Mart’s rise to supply chain pre-eminence was driven not by technological forces but by political choices and contextually dependent business decisions. Ideas about how to efficiently structure a firm changed substantially over the course of the twentieth century, with important consequences for the ways in which workers employed by those firms could challenge the conditions of their work.

The maintenance of epistemological doubt, rather than seeking prescriptive knowledge, is furthermore essential to the professional historian’s toolkit (Landfester and Metelmann, 2020). Rather than selectively interpret the past to present a linear path to the present/future, historians seek out surprising counterexamples and paths not taken that shed light on our current moment. Damon Yarnell (2017), for instance, has convincingly demonstrated that Ford Motor Company, even during the supposed height of its vertical integration in the early twentieth century, in fact relied on

thousands of suppliers. While contemporary supply chain theorists see anything before the 1960s as unplanned and unmanaged, Yarnell provides substantial documented evidence of the care and strategic foresight with which Ford purchasing agents maintained relationships with those suppliers. Acknowledging that the term “supply chain management” would be anachronistic in 1919, Yarnell nonetheless demonstrates how Ford purchasing agents did exactly that, managing systemic risks in the supply chain to ensure not just low costs but also long-term relationships to produce value for multiple stakeholders. Likewise, Daniel Raff has convincingly argued that the bookseller Borders, far from being an example of failed supply chain management, was in its time a particularly sophisticated innovator. Unlike its one-size-fits-all competitor Barnes and Noble, Borders developed profitable supply chain management software which enabled the firm to match a diverse array of books to diverse customers in far-flung locations (Raff, 2000).

Finally, when considering context, historians cast their net widely. Rather than seeking monocausal explanations of change over time, in which “context” is treated as a control variable, historians embrace diversity, contingency, variation, and serendipity when exploring contexts (Welter, 2011; Zahra and Wright, 2011). Rather than assuming context, historians elaborate it. In terms of supply chain history, one quite notable aspect of context is routinely overlooked by supply chain theorists: financialization. Whereas supply chain theorists tend to assume that the asset-lean corporation that

outsources manufacturing and logistics functions is a product of rational managerial action, historians would suggest that the growing political, economic, and cultural power of financial institutions that characterized the 1970s and 1980s was a strong causal element driving the “leaning” of American corporations (Davis and Kim, 2015; Krippner, 2005; Millberg, 2008). Even here, however, there is room for historians to situate the late-20th-century transformations of capitalism in a broader context.

Historians increasingly recognize, for instance, a long trajectory of financialization well before the 1970s (Hansen, 2014). Additionally, historians of international business understand the long history of multinational corporations outsourcing nearly all their assets, well before the rise of the vertically integrated Fordist firms of the mid-twentieth century (Mollan, 2018; Wilkins, 1988). Furthermore, historical analysis can reveal surprising directionality in the causal relationship between financialization and supply chain management strategies: Ford Motor Company, as historian Stefan Link (2018) has argued, pivoted to vertical integration in the 1920s not primarily as a profit-maximizing strategy but largely due to a producer-populist rejection of financialized control of the firm’s mission.

Historians also tend to assume that context is not merely determinative (causal), but also a product (consequence) of changes. Take, for instance, Wouter Ronsijn’s and Eric Vanhaute’s (2018) history of Belgian food crises in the mid-19th century, which traces the internationalization of Belgium’s food supply chains. They argue that

resultant food price shocks emerged not only from the economic restructuring of those supply chains but also from a decline of localized moral economies of food access. One consequence, then, was that market-dependent urban centers with proletarianized labor suffered most from the transformation of what, in retrospect, we can understand as global supply chains. Indeed, such anachronistic uses of the concept of supply chains may be particularly useful for historians seeking not simply to explain the rise of contemporary supply chains, but instead to understand the wider context of the past—to neither disown nor selectively interpret that past, but to embrace its complexity and richness. Thomas Spain and David Turner (2022), for instance, have recently argued for the usefulness of anachronism as a means of studying historical food supply chains, with concepts from supply chain theory and global value chain theory enabling new insights into regulatory policy, consumer culture, and the dynamic development of technological infrastructure.

By exploring the context of supply chains in greater richness, by maintaining epistemological doubt regarding the nature and permanence of global supply chains, and above all by digging up empirical evidence of counter-examples and contestations to “the one best way” of supply chain management, historians could bring important insights to bear on the research and educational approaches of the field itself. Some hints already exist that supply chain theorists are primed for such material. One study, based on interviews with supply chain managers at firms with stellar “reputations for

progressive supply chain practice,” found that none of the firms actually delivered on the theoretical goals of fully coordinated supply chains (Fawcett and Magnan, 2002). In recent years, the business press has been abuzz with examples of supply chains breaking down or failing to deliver on promises. The visual imagery of the *Ever Given* mega-container ship, stuck for six days in the Suez Canal in 2021, will surely haunt supply chain managers for years to come. That same year, Swedish homeware multinational IKEA was compelled to announce that it could not predict its inventories, as soaring transportation costs and truck driver shortages during the Covid-19 pandemic resulted in shelves bare of flat-pack furniture across Europe (Romei, Arnold, and Ghighlione, 2021). A 2022 article in *Harvard Business Review*, surveying the ongoing disruptions, went so far as to query whether “the risks of global supply chains [are] starting to outweigh the rewards?” (Shih, 2022) One logistics expert has gone even further, suggesting that not only is there no such thing as “supply chain management” (because no supply system is as linear as the chain metaphor suggests, and the hubris of “management” of such complex systems is overhyped), but that the entire field should be “abandoned” (Beer, 2021). Epistemological doubt, it seems, may be creeping into the world of supply chain managers.

CONCLUSION

Historical contextualization is problematically absent from many subfields of management studies, not just supply chain management. Yet as we have strived to begin to demonstrate, historical contextualization holds great promise as a mode for addressing the socioecological grand challenges of the present and future. History is of course rooted in the past, but the act of doing and reading historical analysis is very much located in our living present. Historical methods, we insist, can enable a capacity for identifying the most important causal elements in the polycrises at the core of contemporary grand challenges, and furthermore enable a richer understanding of the subjective meanings attributed to constrained decision-making by organizational actors. As a first step towards a coherent conceptualization of historical contextualization as a managerial capability, this paper draws on insights from specific subfields, with the eventual goal of staking a larger conceptual territory of use across multiple subfields of management studies.

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