HISTORICAL RESEARCH IN MANAGEMENT

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ABSTRACT

Ever since the last decade, the use of history has consolidated its place as a legitimate perspective in research into management in general and organizational studies more specifically. However, despite its evolution, this type of research still lacks adequate information on the concepts and procedures that allow for its operationalization. In this sense, this article aims to discuss the course of historical research in management as a research method in the hope of elucidating the whole concept of historical research and the historical method. In order to achieve this goal, we seek to revisit the concept of historical research and then discuss the three main guiding concepts of historical research: historical fact, sources and historical documents and operations, all set within a course and methodological operationalization that considers the different stages of historical research and their particularities. Through this discussion, we intend to open the way for researchers in the area of management to assume a critical and reflexive outlook capable of breaking with traditional thinking and one that perceives organizations as static structures that are regular and constituted from causal relationships and whose universal laws and standards seek to explain and predict, historically speaking, what happens in the social world.

KEYWORDS: Historical Research, Research Method, Qualitative Research, Historical Method, Historical Source.

INTRODUCTION

What is historical research? How can one operationalize it within management studies? The search for answers to these questions has, in recent times, led researchers to up the debate in different journals and at various academic events. This has partly occurred because, although a historical perspective is already understood as being an important theoretical-epistemological tool for understanding different organizational phenomena (COSTA; BARROS; MARTINS, 2010; VIZEU, 2010; ROWLINSON; HASSARD; DECKER, 2014; BARROS; CARRIERI, 2015; BARROS, 2016; COSTA; SILVA, 2017), there are still very few works out there that effectively attempt to explain what the historical method is, what its peculiarities are and what its main procedures applied to the field of Administration might be. In Brazil's case, more specifically, there are some researcher's articles whose purpose may be considered to be of a methodological/instructive nature and that have attempted to bring the two areas closer together (VIZEU, 2010; MATITZ; VIZEU, 2012; CORAIOLA, 2012), set out the specificities of the role of the historian (BARROS, 2016) or even suggest bibliographies (COSTA, 2015), but these have, however, failed to spark any kind of debate on the subject of historical research and ways in which one can best orchestrate it.

This shortfall is not, however, merely restricted to Brazilian articles, but it has also sparked a good deal of international debate over the use of the historical method in Administration research (YATES, 2014; MACLEAN; HARVEY; CLEGG, 2016). In the midst of this debate, some authors have argued that despite its increasing popularity, historical research is still somewhat marginalized in the majority of books dealing with research methodology in the social sciences, and still receives less coverage than other research methods (BELL; TAYLOR, 2013; KIPPING; WADHWANI; BUCHELI, 2014). Even if one considers a few exceptions, the fact is that literature on the subject of methodology in social research refers little or not at all to this approach and, when it does, offers a very limited view that is unable to cope with the challenges that arise from working with historical sources and that fails to clarify "how one should analyze and interpret this kind of evidence in terms of generating results that have validity and reliability in organizational studies" (KIPPING; WADHWANI; BUCHELI, 2014, our translation, p.310).

One could say that one of the strongest arguments in relation to this shortfall effectively transfers a degree of responsibility to the historian who, in carrying out his research, is not required to methodologically justify his work (BOOTH; ROWLINSON, 2006; DECKER, 2013; DE JONG; HIGGINS; VAN DRIEL, 2015). However, as Yates (2014) points out, the lack of a greater clarification of different methods does not imply that they are absent, nor reflect any kind of negligence on the part of the methodology adopted. This discussion is more a question of the different schools, norms and writing practices that exist rather than a lack of methodology in historical work. Thus, either because of the marginality of this methodology in books or because of the lack of clarity attributed to the practices of historians, the debate over the historical method appears to demand greater clarity in relation to its operational procedures, especially in the case of research applied to management studies, where transparency and, primarily, clarification relating to the methodological practices employed are essential requirements (ROWLINSON; HASSARD; DECKER, 2014; YATES, 2014). Hence, any effort to unravel this question is of great importance to those researchers in the field of Administration who use or mean to use a historical perspective in their work.

As previously mentioned, different international journals have already begun to move in this direction. In 2013, for example, the journal *Management and Organizational History*, motivated by "the need to offer guidance to those who wished to put historical approaches into practice", published a special edition entitled "*Doing Historical Research in Management and Organizational Studies*", aimed at sharing some of the experiences of authors who had already used the historical method in their work. The idea was to offer some practical guidance, albeit in incipient form, to help demystify the use of this method (ADORISIO; MUTCH, 2013, our translation, p.2). More recently, in 2015, the journal *Business History* once again brought up the question in an article entitled *"A New Business History"* in the hope of discussing whether the adoption of methodological procedures might lead to a new concept of the History of Business (DE JONG; HIGGINS, 2015).

In 2016, as an example of the newfound importance given to the subject, two special numbers were produced: *"Re-visiting the historic turn 10 years later: current debates in management and organizational history"*, in the journal *Management & Organizational History;* and *"Special Topic Forum on History and Organization Studies"*, in one of the leading journals in the area, the *Academy of Management Review*, which were fully dedicated to the subject of history in organizations. The editors began by stating that their line of investigation focusing on Organizational History "had matured sufficiently that it could contribute to a wider-ranging debate and had developed sufficiently to justify theoretically-based research" (GODFREY; HASSARD; O'CONNOR; ROWLINSON; RUEF, 2016, p.590-591, our translation). Finally, in 2017, the journal *Business History Review* produced a special number entitled *"Debating Methodology in Business History"* with the main aim of highlighting new methodologies in Business History.

It is line with this movement that the present article seeks to reflect upon historical research as a method to be used in management research in general, and in organizational studies more specifically, over three stages. Firstly, we present the historical trajectory of historical research in the field of Organizational Studies. We then discuss the main concepts that govern historical research and finally, we put forward a possible course of methodological operationalization that could be adopted and that would take into account the different stages of historical research and their peculiarities.

THE HISTORICAL TRAJECTORY OF HISTORICAL RESEARCH IN ORGANIZATIONAL STUDIES

A more specific interest in how to operationalize historical methodological procedures in order to help one better understand and problematize organizational phenomena is linked to movement known as the Historical Turn, which has debated the importance of a historical perspective in Administration (BOOTH; ROWLINSON, 2006; ROWLINSON; HASSARD; DECKER, 2014).

While for a long time the focus of debate was on the relevance (or lack of it) of a historical perspective, today this importance is guaranteed and accepted on both sides of the aisle. In the field of Organizational Studies, for example, the use of history to better understand different organizational phenomena cannot be viewed as something new and indeed a brief review of the historical trajectory of this relationship can be quite illustrative. During the second half of the 20th Century, when it developed as a distinct and separate subject, Organizational Studies was strongly influenced by the North American scientific view that resulted in history being sidelined and research assuming a singularly ahistorical nature (KIESER, 1994; ÜSDIKEN; KIESER, 2004). This situation remained until almost the end of the 20th Century. From the 1990s onward, however, we saw the emergence of a movement to reunite these two fields of study, which has continued to this day (ZALD, 1993; GOLDMAN, 1994; KIESER, 1994; ÜSDIKEN; KIESER 2004; BOOTH; ROWLINSON, 2006; JACQUES, 2006; ROWLINSON; HASSARD; DECKER, 2014). Nevertheless, in our view, this reunification process has gone through three different phases.

The first takes us back, as previously mentioned, to the 1990s, when a number of authors (ZALD, 1993; GOLDMAN, 1994; KIESER, 1994) argued in favor of the (re)introduction of a historical perspective into Organizational Studies. This period can be defined not as one of an effusive output of works linking the two subjects, but rather as a period which produced work focusing on the importance of historical analysis to the better understanding of organizational phenomena. Merely appealing to pedagogy, we have defined this phase as a resumption, since in our view the articles produced during this period were primarily aimed at resuming the approximation between History and Organizational Studies and calling upon other authors and researchers to get involved in this cause by highlighting the benefits that such an approximation might bring to the understanding of organizations. An article that exemplifies this very well is one by Kieser (1994) with the suggestive title of *"Why Organization Theory Needs Historical Analyses – And How This Should Be Performed"*, which was published in *Organization Science* in November of 1994, this after the journal's editor attended a presentation given by Kieser at the *European Group for Organizational Studies* (EGOS) 1993 event, during which the author highlighted the importance of historical analysis to organizations and listing three main reasons for this (KIESER, 1994).

The first reason given was that structures and behavior in the present time of organizations reflect historical development. In other words, understanding an organization necessarily implies knowing its history and the events that shaped the organization and how it works (its cultural past). The second reason given explains that the analysis of the past of organizations enhances our understanding of current theoretical and practical explanatory tendencies. According to Kieser (1994), understanding past events may not only support the application of modern-day theories, but also help in the explanation that such theories offer for certain phenomena. The third reason argues that situations in the present, which from an ahistorical point of view may be interpreted as having come about naturally, when analyzed from a historical point of view, may present certain alternatives to the process that led to such situations existing. Historical analysis thus becomes important as a tool for criticizing deterministic interpretations of organizational phenomena. There is also a fourth and final reason, which suggests that historical analysis, and its long-term view, can offer a more rigorous test of theories that deal with organizational changes.

A second phase can be seen in the mid-2000s, when another set of articles (e.g. CLARK; ROWLINSON, 2004; ÜSDIKEN; KIESER, 2004; BOOTH; ROWLINSON, 2006; JACQUES, 2006) proposed discussing historical research in Administration following the path laid out during the previous decade. In our present research, we consider this new phase as the consolidation of the historical perspective, given that the work that was carried out during this time was largely focused on establishing epistemological foundations and research agendas thereby confirming its relevance to Organizational Studies. This period also saw an increase in the demand for work that used a historical perspective in Organizational Studies in what was referred to as the Historical Turn, following in the footsteps of other social sciences in a movement to revive history.

As explained in Clark and Rowlinson (2004), this reverting back to History was part of a broader transformation in reference to terms such as "discursive turning-point" or "linguistic turning-point". This turning-point assumes that cultural differences at different moments in history can have different interpretations, meanings and views of the world, demanding from the researcher a more effective use of History when explaining the phenomenon under study (VIZEU, 2010). Thus, the movement represented by (a) the increasing demand for work that establishes some kind of link between History and Organizational Studies, (b) the number of research programs that combine the two areas, (c) the significant number of works on the subject, and (d) the launch of certain periodicals specializing in the subject, as in the case of *Management & Organizational History*, consolidates all these under the aegis of the historical turning-point, thereby offering a unicity to different scattered events related to the approximation between History and Administration (CLARK; ROWLINSON, 2004; ÜSDIKEN; KIESER, 2004).

It is worth noting that, differently from the previous phase, the tonic of the articles during this period sought in some way, to encourage a debate that might substantiate the creation of a new theoretical field. This is certainly the case, for example, of Üsdiken and Kieser (2004), who offered a classification of published works on the subject based on three distinct positions, which they denominated as: supplementarist, integrationist and reorientationist. In short, the supplementarist position can be characterized by its adherence to the view that Organizational Studies are a social science to which History can make a substantial contribution - confirming and refining theories – and a methodological contribution through the selection of variables and the generation of hypotheses within a theoretical context. This position includes history "as yet another contextual variable, alongside other variables, such as national cultures" (BOOTH; ROWLINSON, 2006, p.8, our translation). The supplementarist position therefore treats History merely as a factor of the contextualization of the observed phenomenon. The integrationist position, meanwhile, believes that History should be worked in an articulated way with the other human sciences. According to this position, the enrichment of history as an addition to organizational studies can be achieved through the understanding that "organizational forms and arrangements have been shaped by past events and that its development path has been influenced by the broader context" (ÜSDIKEN; KIESER, 2004, p.323). The reorientationist position, on the other hand, seeks to criticize the ahistorical analysis found in organizational theory (BOOTH; ROWLINSON, 2006). Furthermore, it seeks to question the supplementarist and integrationist positions themselves. The reorientationist position looks at History in a more decisive way within Organizational Studies, allowing one "to confront different alternatives in terms of theoretical orientation, methodologies and views of the world, favoring a narrative focus that is aligned with the broader interest of interpretive and discursive orientations and in opposition to the traditional scientific framework" (COSTA; BARROS; MARTINS, 2010, p.296).

A third phase observed in this trajectory of the historical perspective within Organizational Studies can be linked to more recent studies, dating back to the end of the first half of the present decade. During this phase, History was already considered an important field of study to the understanding of organizational phenomena and work in this area was primarily focused on more methodological and procedural aspects. Consequently, and once again for purely didactic reasons, this phase will be referred to here as the methodological phase. Thus, work produced during this phase sought to emphasize questions that might help achieve the convergence between these two fields, especially in procedural terms, highlighting differences considered relevant in the procedures used by historians and social scientists. Suggestions were made as to how one might achieve a convergence between the different ways one carries out historical research within organizations, especially ensuring that such research might flow more smoothly within Management Studies.

In this sense, one should highlight the work of Rowlinson, Hassard and Decker (2014), some chapters from the book entitled *Organizations in Time: History, Theory, Methods*, by Bucheli and Wadhwani (2014) (the chapters from the book that deal specifically with the subject of procedural methodology are the work of Yates (2014); Lipartito (2014); and Kipping, Matthias and Wadhwani (2014)), and the special editions mentioned in the introduction of this present article.

Rowlinson, Hassard and Decker (2014), for example, point to three epistemological dualisms amongst the many practices used in the fields of History and Organizational Studies. The first of these refers to the different explanatory structures relating to the phenomena researched. While the historian is concerned with epistemological problems relating to the narrative construction (with the plot determining the choice of facts, the construction of these using archives and accepting that these same historical facts can be constructed using different forms of narrative), the organizational theoretician submits the narrative to an analysis and to causal relationships between concepts and categories.

The second dualism proposed by these authors differentiates the conception of different sources. According to them, most historians use sources that are the result of the intensive research of documents and archives whose origins and location (usually in public institutions) are clarified in such a way as to guarantee their veracity, using the verification and reinterpretation of other researchers. In this sense, information on the origin of sources is, necessarily explicit in the text or provided in footnotes. On the other hand, the organizational theoretician, whose sources are not, for the most part, available to the public, seeks to clarify his procedures for data collection and analysis applied to a set of data that is rigorously constructed. Veracity is achieved through the possibility of replicating the analysis.

The third and final dualism highlights the importance of periodization in historical research. Historians define the periods of analysis in accordance with the historical context defined by their sources. Different historians can thus adopt different periodizations for the same chronological period, if their sources provide different rifts that suit the object of the research. Organizational researchers use a predetermined periodization, which is normally chronological, and which is assumed as a constant and defined by a historian.

These more recent works do, as a whole, seek to develop historical research, making it more comprehensible. In other words, with the phase of affirmation having passed, researchers in the field of Organizational Studies have now turned their attentions to the development of historical research procedures that can help guarantee the establishment of a dialogue between the two fields without there being any constraints or losses in the field of History, but which can, at the same time, be fully understood by the organizational theorists.

In Brazil, this debate arrived a little later but was nevertheless closely followed by researchers in the field of Organizational Studies who were concerned about the affirmation of History as a field of study and people`s understanding of the administrative phenomenon. In this sense, some studies are good examples of this movement. The pioneering research carried out by Isabela Curado (2001) on Corporate History already pointed to the positive aspects of historiographic research in management, a position that would later be reinforced by Pieranti (2008). Two other works were published in the same year in the *Revista de Administração de Empresas* (RAE – Journal of Business Management) by Vizeu (2010) and Costa, Barros and Martins (2010). These works were already arguing in favor of the possible benefits of an approximation between History and Administration and put forward some proposals as to how such an approximation could be achieved.

More recently, a number of works published in Brazil have turned their attentions to the debate over the sources of historical research. This is the case, for example, of Barros (2016), in which the author discusses the concept and use of archives for research in management; Coraiola (2012), where the author specifically looks at the use of corporate records or archives and the difficulties relating to access inherent in such research; Barros and Carrieri (2015), who focus on the everyday and history, and Amorim Neto and Rodriguez (2016), who seek to define the contributions and the challenges of the comparative history method.

One should point out that the sources used by those researchers who work with history are not restricted to documented sources alone. In this sense, the number of researchers interested in oral sources has also steadily grown. This is the case of Gomes and Santana (2010), who, in the context of the appreciation of qualitative research in the field of Administration, defend the use of the Oral History methodology as an element for bringing History and Management closer together. In focusing on biographical historical methods and by using a bibliometric survey, Colomby, Peres, Lopes and Costa (2016) offer a discussion on the Life History method in Organizational Studies. Similarly, Joaquim and Carrieri (2018) use oral sources to look at and problematize day-to-day management practices by establishing links between history, orality, memory and Life Histories.

Finally, another group of researchers has sought to contribute to the development of historical research within the field of Organizational Studies in Brazil through studies that focus on investigating the historical background of the teaching of Administration in Brazil. These include FGV/EAESP (ALCADIPANI; BERTERO, 2012; 2014); the Schools of Trade and Higher Education (BARROS, 2012; 2017; BARROS; CARRIERI, 2013); organizations such as ISEB (Higher Institute of Brazilian Studies) and ECLAC (WANDERLEY, 2015; 2016) and IDORT (Institute of the Rational Organization of Labor)(VIZEU, 2018); and the History of Brazil's Public Administration (COSTA; COSTA, 2016).

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HISTORICAL RESEARCH

The historical research method systemizes, identifies, collects, organizes and critically evaluates documented sources that relate to events in the past. In a broader sense, the notion of "documents" can assume a wide range of different guises, which can include letters, books, reports, diaries, paintings, sculptures, photographs, films, myths, legends, speeches and spaces (...) (SAMARA; TUPY, 2010, p.117). Nevertheless, the main stages of the production of a historical work are the same as those of any other research project in the area of social sciences and applied social sciences. The structure of a historical research project, for example, is the same as that of a research project in Organizational Studies, involving: definition, justification and delimitation of the subject matter; definition of the problem, objectives and sources of research; construction of a theoretical framework; data collection; critical review and validation of the data; analysis and interpretation of the data; and the synthesis. One should also point out that the historical method may emerge within the confines of a quantitative or qualitative approach. What effectively differentiates the two research methods, and what in our view is the main contribution of the historical method, are certain specificities that make up this structure, and it is exactly this point that we would like to highlight here. Hence, the present article focuses on presenting the following concepts that help guide (in overlapping fashion) the different phases of historical research: (a) the historical fact, understood as an event or events that gave rise to different historical interpretations of the same; (b) the document and historical source, in other words any vestiges of the past that were preserved and that help one better understand the time in question; and (c) the historical operation, the critical process a source is submitted to in order to enable it to resolve the researcher's doubts.

SUBJECT AND RESEARCH PROBLEM

In terms of the definition and delimitation of the subject matter and the research problem, the peculiarity of historical research raises two questions. Firstly, for the historian, the choice of a research problem is not a chance event or somehow personally inspired. Since the researcher is part of a specific era, with its own problems, its own landmark events, its own debates and currents of thought, he tends to choose a subject matter that speaks more of his own concerns than those of past and memorable times (COSTA; BARROS; MARTINS, 2010). As Prost (2012, p.96) writes "the question put by the historian is composed of the present and its relationship to the past, relying on the origins, the evolution and the itineraries [of his research].

In this sense, time (multifaceted) is the substance of history while the time of the historian and the historical research is social time, always incorporated into their research problems, their documents and into the facts being researched and inserted and delimited by a specific periodicity. One should stress, however, that this perspective of historicity is a recent phenomenon, as we can see in the face-off between the traditional political historiography (the Methodological School) and the renewed historiography (the Annales School) (BURKE, 1992; 2010). Thus, contrary to the presuppositions of traditional historiography, which considers objective history (whose documents are the undeniable depositories of the truth of past facts, calmly and quietly waiting in their archives to be discovered), renewed historiography offers us the inevitability of the lack of exemption on the part of the researcher as he looks into the past and a history that is dominated by the present (BURKE, 1992; CURADO, 2001; COSTA; BARROS; MARTINS, 2010). According to Prost (2010, p.85), for example, "the historians of the methodological school themselves – who meant to write a purely scientific, switched-off, without fuss history of social contingencies – formulated the question in relation to the nation and the institutions, that is, the most relevant political issues of the time".

Secondly, the delimitation of research in time (temporal cut), in space (geographic) and as a universe of analysis (homogeneity of the sources) demonstrates the issue of using historical sources. Indeed, it is the researcher who has to choose between a plurality of temporality levels: the short period of events, the average period of different conjunctures, the lengthy duration of structures and the differences in their pace. In other words, the subject matter leads the researcher to choose the temporality, the method, the techniques and the sources that he means to use in his research, since each different area of historical studies has its own peculiarities (e.g. in the case of the History of the Present Time, the sources generally used include testimonials and interviews).

According to Aróstegui (2006), the motivation for carrying out a project of historical research may emerge from new sources, new links between sources or from a dissatisfaction with the existing facts based on new points of view or new social curiosities. One peculiarity of historical research suggests that research motivated by new sources is often as important to the advancement of historical knowledge as the pioneering of new fields of research. Such concerns lead a researcher to delimit the subject of his research upon which he means to base his problem. Before this, however, just like any other researcher, the historian must develop his research plan in order to explain his planned approach to the subject. Any historical research planning should then specify the subject matter of the research project, the procedures the researcher expects to employ to study this subject and the sources he means to use. This last point is worth highlighting: in determining how he means to investigate the subject in question, the researcher should carefully consider his sources, the way the information is to be organized and any links there might be with other research done on the subject. Even though this author points out that such precision is almost impossible at the outset of any research project, he does stress that any such project cannot progress unless the researcher is "aware of his objectives and the means or tools he plans to use" (ARÓSTEGUI, 2006, p.469). Once the planning stage is complete, the researcher must refine his research subject matter to try to circumscribe it as a problem. Based on this problem, the researcher can then define the objectives of his research by considering its different chronological, systematic and territorial delimitations.

DATA COLLECTION: SOURCES AND HISTORICAL DOCUMENTS

For any historical research project, facts, documents and historical sources are constituted using an overlapping relationship of interdependence.

What are historical facts? Historical facts are the foundation stone of the work of a historian and are never constructed in a definitive way. An official narrative is not synonymous with a truthful narrative but is rather more the idea of a narrative that has been consecrated and/or legitimized by a society in a specific space and time. This is because there is no such thing as a univocal view of the past. On the contrary and as previously mentioned, new versions of the past emerge on a continuous basis as new sources are identified and constructed.

Consequently, historical facts can always be verified, that is, the historian always offers one the possibility to check the veracity of his affirmations. This is an important point. The historical method is based on certain verification rules that generally appear in footnotes (EVANS, 1997; ROWLINSON; HASSARD; DECKER, 2014; YATES, 2014). Thus, while social researchers exhibit their procedures for constructing data for one's inspection in a methodological section or chapter of their work, historians use complex and extensive footnotes to clarify their sources, locations of archives, source authors, date of publication, file names and location references (KIPPLING; WADHWANI; BUCHELI, 2014). In other words, footnotes, similarly to bibliographic references are not merely "rhetorical devices for producing the effect of veracity", but they also help readers to check whether the sources used are aligned with and back the statements and affirmations made by the historian in question (EVANS, 1997, p.127).

Historical facts are created through documents and they assume a degree of importance because, to a certain extent, they form the basis of historical judgement. One should stress, however, that every historical document is a permanent construction and it allows (and/or enables) different readings or interpretations of the facts. One thus assumes that a document is a social product and that therefore, (a) it is everything that a specific moment in time governs a document to be; (b) it is considered a historical document as a result of a specific point of view held at a specific period in time; and (c) there is some link to the social environment that decides to preserve it as such (KARNAL; TATSCH, 2009). As an example of this view, the very notion of the historical document constructed socially as from the end of the 19th Century – with an emphasis on documents written as items of History and circumscribed in libraries and archives – changed over the course of the 20th century. If previously the historian (autonomous, impartial and neutral) had the job of identifying historical sources and the authenticity of documents, today both the notion of the historical fact and that of the document have changed significantly (COSTA; BARROS; MARTINS, 2010).

As the notion of the document changes, so the notion of the historical source expands in scope. That is why, according to Pinsky and Luca (2013), the document is transformed into a source from the point of view of the historian. It is the historian who transforms evidence from the past into historical sources, using the dialogue he establishes with such evidence. In other words, it is the historian who gives voice to his sources, questioning them about what they can reveal about the societies and the periods in time to which they belong. In this sense, it is the research process itself that constitutes the historical sources through a dialogic process of questions and answers between the researcher and the source (LIPARTITO, 2014).

One can thus safely state that there are no historical sources a priori (before one begins one`s research), nor indeed any absolute sources. All sources are historical for a specific research question, in other words, historical facts do not exist as a natural consequence, but rather as one that results from the perspective of a specific observer. We can therefore consider all and any "material, instrument or tool, symbol or intellectual discourse that is the result of human creativity and through which one may infer something in relation to a specific situation in time" as being a historical source (ARÓSTEGUI, 2006, p.491). Thus the historian, in using such sources, can reconstruct the past and credit it with meaning.

One should stress that not all historical sources come in the form of written documents and one can clearly see a present-day movement underway in favor of non-traditional sources. Common sense dictates that traditional sources are generally to be found in public archives (national, state or municipal); private archives, museums, libraries and memory and document centers. However, historical documents and sources can also assume different configurations (forms, approaches and places), such as: "(…) saint worship, religious doctrines, pornographic and prohibited books, illustrations, caricatures, newspapers, manuals of good practices, photographs, medical literature, prescriptions, food diets, (…) and countless others" (JANOTTI, 2006, p.15). Using new alternative sources helps enrich areas of study where there is some degree of difficulty in obtaining access to traditional historical sources, as in the case of the History of Business and/or Corporate History. In terms of access to and the use of corporate document sources, for example, in Brazil's case there are very few company collections or archives that are sufficiently organized and available for public consultation. In such a context, and in proceeding with any research based on Corporate History, Curado (2001, p.) suggests that "to compensate for the lack of systemized documents (…) one should use a variety of different sources, such as, for example, testimonials and narratives of oral history, seeking to verify the characteristics of such organizations, their processes and their administrative activities for the period being studied".

Nevertheless, a great number of sources are hard to come by or are in poor condition, and this demands a good deal of patience, time and attention to detail on the part of the researcher in his investigative work. In this sense, classifying a source using certain criteria can help in the task of contextualizing and analyzing it. According to Aróstegui (2006), sources can be classified according to their position (direct or indirect), intention (voluntary or not) and qualitative (material or cultural sources) or quantitative aspects.

The first of these groups – direct or indirect sources – refers to the concept of the primary or secondary source. Direct sources are those that are created within the historical context under study, whereas indirect sources are those that are mediated. Modern-day studies of History relativize this concept to the extent that such a classification depends on the nature of the study. Thus, a source may be viewed as direct in one study, but indirect in another. The criterion of intentionality considers the intentionality of the source. Intentional sources can be divided up into those that are material (which include constructions made to register historical items of information, such as gravestones, or memorials, such as the Arc de Triomphe in Paris) and those that are cultural (chronicles, oral sources, biographies and memories). Non-intentional material sources are all those objects, constructions, utensils and coins whose purpose is something other than to perpetuate information or memory. Similarly, administrative, legal or economic documents can be considered as non-material non-intentional sources. This distinction between material and cultural is what characterizes a source, qualitatively speaking. The quantitative criterion alludes to those sources that are exhibited in large numbers and that can be laid out in series in the form of records in a data bank, as well as quantitative numerical data such as, for example, historical series of data used in economic studies.

Just like sources, data can also be classified. Here one should perhaps include a caveat in relation to the different referrals adopted by organizational researchers and historians which, according to Rowlinson, Hassard and Decker (2014) reveal a profound epistemological dualism between the two perspectives.

Those organizational researchers who adopt qualitative methods prefer to use primary data, in other words, data that is created (for the most part by the researchers themselves) with a specific purpose within the research being carried out, such as interviews or observation (ROWLINSON; HASSARD; DECKER, 2014; YATES, 2014). The historian, on the other hand, prefers documents, images or artefacts that were created at another time in the past and whose purpose was not, obviously, aimed at the current research project. Rowlinson, Hassard and Decker (2014) explain that what qualitative organizational researchers refer to as secondary data, in other words, data created for purposes other than the research project in question, is in fact considered by historians as primary data if it was created during the period covered by the study in question.

These sources are created during the period covered by the study and, because of this, from the historian's perspective they constitute the best source for his research (LIPARTITO, 2014). The more primary the source is, the more valuable it is to the historical researcher. Since the historian is unable to recreate historical facts or even observe them, his function is confined to reconstructing and understanding the past using evidence created on a day-to-day basis, even though that evidence might not have been specifically created to meet the needs of future research (YATES, 2014). Thus, artefacts, documents and images are worth more to the historian if they were created at the time in the past he is studying, even if they were not created with the specific purpose of helping him in his research and this is why they are considered to be secondary sources by all other categories of social researchers. The latter consider such sources to be liable to bias, since they were created with other goals in mind and cannot therefore be considered as reliable (LIPARTITO, 2014; KIPPLING; WADHWANI; BUCHELI, 2014; ROWLINSON; HASSARD; DECKER, 2014). Lipartito (2014), however, argues that the preference for primary sources (secondary data) on the part of historians has the very purpose of increasing the validity and reliability of the any such research project.

Reliability or consistency can be understood, according to social scientists, as the capacity of a certain procedure to generate the same results in different tests. For the historian, reliability comes from the level of interference of an author in producing his source (KIPPLING, 2014). The preference for sources that were not intentionally created can be justified by arguing that such sources, created with other goals in mind, were not shaped in such a way as to meet the specific requirements of future research and therefore offer, in the historian's mind, greater reliability (LIPARTITO, 20140; KIPPLING; WADHWANI; BUCHELI, 2014; ROWLINSON; HASSARD; DECKER, 2014).

Using primary sources ensures that "many different eyes examine the same sources in their original contexts", (LIPARTITO, 2014, p.288), thereby ensuring a replication of the research even if the objective is not to question the previous findings, but rather to contribute with new views and new perspectives. Thus, not only does the concept of reliability diverge between these researchers but so does that of validity: while for organizational researchers, validity refers to the capacity that a specific instrument has to measure a certain phenomenon, in historical research this concept is associated with the study of the circumstances in which a certain source was created. Thus, a source has validity, above all, when it is constituted within the period under analysis (LIPARTITO, 2014; KIPPLING; WADHWANI; BUCHELI, 2014).

Furthermore, it is important to verify that a source is historically appropriate to the subject of research. As Lipartito (2014) points out, a newspaper from the 19th Century can be considered as a primary source in a historical study of media and vehicles of communication, but it may only be viewed as a simple narrative if the subject of the research is daily customs and the policies of the day. In this regard, Aróstegui (2006, p.481) states that "a historical source is a source "for" some history [...]". The validity of a source will depend, therefore, on the context in which it was created, considering its author and its appropriateness in relation to the subject under study, and the more appropriate it is in relation to the study and the more contemporary it is to the period being studied, the more valid it is.

Regardless of the methodological orientation adopted, whether quantitative or qualitative, the researcher in management has the prerogative to choose the temporality of his study. Management Studies offer just as many possibilities for the study of a specific phenomenon over time, its causes and the changes it brings about, in the form of a longitudinal study, as they do for the study of a specific phenomenon at a particular moment in time. Although liable to criticism, for ignoring the historical context (ROWLINSON; HASSARD; DECKER, 2014), Management Studies are not committed to longitudinal studies, which are invariably and by definition the basis of historical research (YATES, 2014). The historian cannot ignore the temporal-sequential behavior of the social phenomenon he is studying, since temporality "is the determining factor, the essential condition of his research" (ARÓSTEGUI, 2006, p.454). As Prost (2012, p.96) adds, this occurs because of the diachronic dimension of his research that makes the historian different from other researchers (such as sociologists and ethnologists): "history is made over time".

Furthermore, in the case of management studies time is considered to be a constant, instead of something historically situated. In other words, the researcher in this field views time in accordance with a previously defined timetable (usually by a historian), in a sequence that is based on physical time, using dates and events as markers, as in, for example, the post-war period, the French Revolution or the Middle Ages (ROWLINSON; HASSARD; DECKER, 2014). The historian, meanwhile, divides up social time in accordance with his sources and the historiographic context. For example, a historian involved in a corporate research study will consider time in accordance with social events linked to the company under study (mergers, acquisition of new plants, the founder's death etc.) and not in relation to previously defined events outside the scope of that company, such as the second world war or the attacks of September 11th. This procedure is called periodization, where it is the researcher that defines his object within space and time based on a historical context.

Returning to the collection of data procedures (sometimes referred to as documentation), these begin with the researcher working on identifying and locating the sources most relevant to his research work (CARDOSO, 1982; BACELLAR, 2005). This work, involving the discovery of sources pertinent to his research project, is the historical researcher's first observation task (ARÓSTEGUI, 2006). The researcher must then "find out where he can obtain the documents that might be helpful, often having to overcome major bureaucratic obstacles and the lack of properly organized information and this even when dealing with public archives" (BACELLAR, 2005, p.46). In this aspect, a good suggestion might be to begin with the footnotes and bibliographic references provided in studies already published on the subject being researched. Cardoso (1982, p.86) suggests that in addition, the researcher can make use of "catalogues and files from archives and libraries, in consulting previously published documented and bibliographic bodies of work [...] archivists and librarians [...] historians and other "scholars" that have already researched the field [...]".

Today, our research tends to rely on the use of electronic research tools. However, in terms of historical documentation, there are still very few places that can offer a fully digitalized collection, which means that one must still resort to accessing certain sources physically (BACELLAR, 2005). According to this author, the idea is that the available sources should contain information about the entity that catalogued such documents, describing in detail the documental typology that was produced. Usually, the sources one consults in leading public and private archives do provide this information, since they have already gone through the process of identification, cataloguing, inventory and rationalization using some filing technique or other that ensures their proper archiving. Nevertheless, the researcher may well encounter other kinds of document that have not been properly analyzed and processed, especially in the case of personal documents that have been obtained directly from individuals and their heirs or even from companies.

We should stress here, especially when considering the question of historical research that researchers do not always have free access to the sources they require. Even though they might know that these do in fact exist and then discover where they can be found, access to them and the reproduction of their content may be controlled by some institution or legislation or other (CORAIOLA, 2012). In terms of research within companies, a good deal of information tends to be considered confidential, and access and/or reproduction of the same is often not authorized (COSTA, 2004). Similarly, sensitive documents, often relating to periods involving repressive regimes, are invariably protected by laws of access (freedom of information laws) or even restricted by the institution that created them or holds them in storage.

Over the course of his research, the historian should record every and all items of data that might help identify a document (archive or file reference number, issuer, person or institution that produced it etc.) in order to document such information in the research report or paper and thus help guide the reader in using the same documentation if he or she so desires. Cardoso (1982) suggests the creation and use of a document identity form. This contains relatively stable information in printed form and provides spaces to be filled in by the researcher with data relating to the collection, subject matter, number of pages and author etc. Currently, such a form can be produced beforehand, printed and then taken to the place where the research is being done, thereby enabling the researcher to fill in the appropriate spaces at the same time as he collects his data. This kind of control allows the historian to keep a record of his research and complete it, guides him in relation to the next documents to review and helps fill in any gaps there might be (ARÓSTEGUI, 2006).

Just as in other social sciences, the historian must assess the number of sources he investigates and his relationship with the increasing quantity of knowledge he absorbs. From the outset, the discovery of sources contributes a good deal to helping explain the problem in question. The data collection phase, however, is the most drawn out phase of any research process, and the one that can lead to delays and unproductive work effort. Once the collection of information becomes a redundant bringing together of data that offers no additional benefits in terms of knowledge, the researcher must then suspend this phase of his research and move onto the stage of analysis and interpretation of the material that has been collected.

HISTORICAL OPERATION: CRITICAL REVIEW AND ANALYSIS OF THE DATA

In view of the myriad of different kinds of evidence available and that have the potential to play the role of a historical source, one must ask the question: how can one differentiate historical sources from mere artefacts and documents? After all, not all records can be considered as historical sources, even though records always exist as evidence of certain events.

As previously mentioned, historical facts do not exist as a natural consequence, but rather as one that results from the perspective of a specific observer. It is this view of the historian in relation to his sources – through the historical operation of an internal and external critique of documents – that transforms a source into a historical source. This process of transformation occurs through the "adoption of some basic procedures that make the researcher's work more secure" (SAMARA; TUPY, 2007, p.70). In approaching a new source, the researcher should first question its reliability and its pertinence (ARÓSTEGUI, 2006). According to this author, any analysis of the reliability of sources should include a verification of authenticity, a purge of the information and a contextualization. Authenticity should be assured by means of a dating (layering, radiometric and explicit dating verification) and/or linguistic process.

In order to verify internal credibility, in other words, the value of the content of the source in question, the researcher should deal with the question of the validity and the reliability of this source. Hence, he should give continuity to the historical operation, questioning the conditions of creation and preservation of this source. The validity of a source is closely related to the concept of the primary source mentioned earlier. Furthermore, during the process of contextualization of his source, the researcher should assess the original author's intentions in creating this source. Aware that documents cannot possibly ever be completely neutral, the researcher should know how to assess the circumstances and influences under which the source he is contemplating was generated and what the impact of this might be on his research. The historian must understand the context of his sources in order to see that "some imprecisions demonstrate the interests of whoever wrote them [...] being a historian requires one to be suspicious of sources, of the intentions of those who produced them, understood only from a critical viewpoint and through a proper contextualization [...]"(BACELLAR, 2005, p.64).

In general, to verify the authenticity of his source the researcher must seek out answers to the following questions: What was the purpose behind the creation of this source? Who created this source? Under what circumstances was it created? Why was it preserved? For whom was it produced? (BACELLAR, 2013; LIPARTITO, 2014). Answering these questions helps contextualize these sources, that is, helps one understand what is represented in them, considering the context of the historical period in which they were produced. As representations of past events, such sources were created within different cultural and social contexts and to meet specific needs that were different to those of the present day (SAMARA; TUPY, 2007, BACELLAR, 2013).

Thus, after the identification and classification of all the sources being used, and similarly to the method used in any other research project in the social sciences area, the collected data must be submitted to a process of analysis aimed at transforming it into an "articulated body of evidence". At this point of the research project, the historian has the alternative of using different techniques to analyze the information collected, many of them coinciding with the other sciences, which can be divided up into qualitative and quantitative techniques. The first group includes techniques of documentary observation (thematic reading of archives, press data, official publications and bibliographic texts); philological techniques (content analysis and linguistic studies); and oral research (Oral History). The group of quantitative techniques includes the tabulation and indexation of documents; the use of descriptive and inferential statistics and; quantified textual analysis. Considering the already mentioned preference for qualitative techniques, the limitations of space in this present work force us to focus in an illustrative way on just the one type of method, to the detriment of all others.

Documentary observation seeks to apply a reading guided by the subject matter being researched and looking at factual information, such as data, reports, news, correspondence, and administrative records related to the phenomenon under study and that can help clarify the problem posed by the research project. The reading of the sources should not be done in a superficial way, but rather with the purpose of explaining the phenomenon under study, going beyond merely describing the facts uncovered. In this sense, it is up to the researcher to transcribe its content in full or partially so as to proceed with a reading that allows for an internal analysis (in relation to the content) and an external analysis that places the document in its rightful context. This reading, influenced by questions relating to the problem posed by the research project, can provide the articulations necessary to allow the researcher to achieve his project's previously set out objectives.

However, any modern-day historical study necessarily demands the use of more in-depth analysis techniques. Thus, a simple thematic reading whose scope foresees the direct and objective apprehension of information may give way to the use of philological techniques such as content analysis and discourse analysis. These techniques allow the researcher to analyze subjacent ideas, revealing hidden meanings that would be impossible to uncover through a simple thematic reading (CARDOSO; VAINFAS, 1997; WODAK, 2001). Any analysis of documents using the resources of language and discourse requires a hermeneutic reading of the source in question based on such resources as polyphony, the selective use of words, etymological and semantic studies, semiotic analysis and the identification of metaphors aimed at understanding social changes over time through language. The last qualitative technique listed here is that of Oral History. This technique can be described as one that uses testimonials obtained orally by agents or witnesses to historical facts (THOMPSON, 1978; FERREIRA; AMADO, 2006). Clearly, the use of this technique limits the temporality of the study as it requires living witnesses or resources such as recorders to record oral statements. Furthermore, the oral source has certain difficulties in terms of objectivity, the handling of data, the correct way of conducting interviews and the recovery of memories and, as a result, the recommendation is that it should be used jointly with other sources. Even so, despite being a relatively new technique, it has allowed many different groups to have a voice within historiography, thereby facilitating the entry of the common citizen into the realm of historical studies.

Finally, as in any research work, the historian should seek to construct an argumentative chain around his research problem and produce a final research report.

FINAL CONSIDERATIONS

This article has sought to reflect on historical research as a method of research that can also be used in the field of Administration. We began by presenting the historical background behind the development over time of the historical perspective within Organizational Studies. A review of this development allowed us to identify the paths/pitfalls that such an approximation posed and the potential benefits that a historical perspective might offer to research in the field of Administration.

The first such benefit refers to the possibility of having a better understanding of administrative (and organizational) phenomena by locating them historically in space and time. By proceeding in this manner, the researcher can denaturalize organizational phenomena by identifying and problematizing their existence trajectory (and the ways in which they act) within society. In this sense, historical analysis can be used as a tool for criticizing deterministic interpretations. Another possible benefit of this approach refers to the potential to create researchers who are plural and more interdisciplinary and ultimately open to new problems and new sources of research. One can also point to the benefit that arises from the problematization of contexts, models, and anachronic organizational theories, which dispense with historical aspects and that, in thus proceeding, provoke methodological distortions and a universal timelessness. Finally, historical research can contribute to an approximation and an engagement between researchers and the local and historical context of Brazilian society.

The historical method is something that is fairly easy to circumscribe. That is not to say that it is easy to implement. Since History is a social practice, differences and complexities reside in the epistemological and theoretical options that researchers fail to decouple from their methodological apparatus and that deal with the kind of history the researchers are choosing to make. Hence, some points are inherent to the work of the historian and to historical research, as for example, the premise that documental sources do not speak for themselves and are not depositories for facts that occurred in the past. That is why we follow by presenting the main guiding concepts of historical research: historical fact, historical sources and documents and historical operation. We believe that the intrinsic relationship between these elements allows us to be conscious of the social (and political) construction, the historical fact and the non-innocence of the document as a source.

Understanding the document as something that is dynamic and socially constructed leads the researcher to necessarily assume a critical and reflexive attitude of (re)cognition in relation to his sources and the implications of his choice in working with them. In thus proceeding, the researcher unveils the processes of manipulation that manifest themselves at every level of the knowledge constitution process. In the case of research in the area of Administration, in thus proceeding, researchers can break with tradition, both by considering organizations as static and regular structures and ones that are constituted on the basis of causal relationships, as well as through the practice of explaining and predicting what happens in the social world and proposing universal laws.

Finally, we propose a route of methodological operationalization that considers the different stages of historical research and their particularities. In taking this route we had no pretensions of listing the ontological or epistemological differences that may exist between the areas of Administration and History, nor indeed of exhausting all the possible methodological differences between the two. Nor have we proposed to indicate a single and limiting method that should be used. On the contrary, we have sought to clarify essential aspects of historical research in such a way as to offer resources enabling the researcher to identify the most relevant points in relation to his own research and, based on his specific interests, decide on the methodological referral that best suits his interests. Thus, the indication of a design for historical research was merely aimed at instigating and opening the way up for historical research, thereby ensuring that more researchers can engage in this perspective.

Concluding, and repeating the question posed by Prost (2012, p.7), "what is one doing when one means to make history?", this article assumes that management can benefit from historical research but that, for this to happen, there is still a need to discuss in more depth certain shared methodological procedures that can be understood and implemented by researchers in both fields.

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