

Methodological Synthesis: Incorporating a Historical Paradigm into a Case Study Approach for Organizational Dynamics Research

Santi Jintamanaskoon¹

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Abstract

Epistemologically, a case study approach and archival research differ in their research traditions, including their temporal emphasis, data collection processes, and methods of interpreting and analyzing data. Whilst a case study is centered around an empirical investigation of contemporary issues and a generalization of case findings through theoretical proposition, archival research is, by contrast, concerned with uniqueness and particularity of historical narratives as a series of events unfolded. This long-held belief has wielded an enormous influence on whether researchers should adopt a case study approach or to [re-]construct an historical account as if they were sharply demarcated. However, this conventional paradigm is found to be very limited, if not problematic, for addressing complex issues in organizational dynamics e.g., an insight into a persistence and change mechanism as well as a legitimization process. To understand why and how organizations have reached their current state, including the decisions they made, the advantages of each methodology should be utilized in a complementary way. In this article, a privatization of British Railways (BR) is exemplified as practical application of methodological synthesis. The example highlights how a notion of dualism in various aspects—explanation, evidence, and temporality—can help ease methodological tensions between two different approaches. It also reveals that performance improvement does not fully capture the complexities of BR's organizational restructuring. In fact, a legitimization process and paradoxical results are more socially and politically complex than improving organizational efficiency. In short, the article has contributed not only by discussing how the archives can be useful in fabricating an historical-institutional account of organizational dynamics but also why a case study approach in organization studies should be more concerned with its past development and change-methodological contribution to the subject area.

Keywords: Archival Research, Case Study, Historical Institutional Approach, Historical Institutionalism, Organizational Dynamic

¹ *Corresponding Author,*

The School of Global Studies, Thammasat University, Pathum Thani, 12121, Thailand
santi@sgs.tu.ac.th

การสังเคราะห์เชิงระเบียบวิธี : การบูรณาการกระบวนการทัศน์ทางประวัติศาสตร์เข้ากับวิธีการศึกษาแบบกรณีศึกษาเพื่อการวิจัยพลวัตขององค์กร

สันติ จินตมานะสกุล¹

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บทคัดย่อ

ในเชิงญาณวิทยา วิธีการศึกษาแบบกรณีศึกษาและการวิจัยเชิงเอกสารดูเหมือนจะมีความแตกต่างกันในแนวทางการวิจัย ซึ่งรวมถึงการเน้นเชิงเวลา กระบวนการเก็บข้อมูล ตลอดจนวิธีการตีความและวิเคราะห์ข้อมูล ขณะที่กรณีศึกษามุ่งเน้นไปที่การสืบสวนเชิงประจักษ์ในประเด็นร่วมสมัยและการสรุปผลของกรณีผ่านข้อเสนอเชิงทฤษฎี แต่การวิจัยเชิงเอกสารกลับให้ความสำคัญกับเอกลักษณ์เฉพาะตัวและความเฉพาะเจาะจงของเรื่องเล่าทางประวัติศาสตร์ในฐานะเหตุการณ์ที่เกิดขึ้นตามลำดับ ความเชื่อนี้ที่มานานได้ส่งผลกระทบต่อการตัดสินใจของนักวิจัยว่าจะใช้วิธีการศึกษาแบบกรณีศึกษาหรือสร้างเรื่องราวทางประวัติศาสตร์ขึ้นใหม่ราวกับว่าทั้งสองวิธีมีเส้นแบ่งที่ชัดเจน อย่างไรก็ตาม กระบวนทัศน์แบบดั้งเดิมนี้นับว่ามีข้อจำกัด หากไม่ถือว่าเป็นปัญหา ในการจัดการกับประเด็นที่ซับซ้อนในพลวัตขององค์กร เช่น การทำความเข้าใจกลไกความต่อเนื่องและการเปลี่ยนแปลง รวมถึงกระบวนการสร้างความชอบธรรม ดังนั้น เพื่อทำความเข้าใจว่าเหตุใดและอย่างไรที่องค์กรพัฒนามาถึงจุดที่เป็นอยู่ในปัจจุบัน รวมถึงการตัดสินใจที่ได้ทำไปแล้ว ควรนำข้อดีของแต่ละระเบียบวิธีมาใช้เสริมกัน บทความนี้ใช้กรณีการแปรรูปรัฐวิสาหกิจการรถไฟแห่งประเทศไทยแห่งสหราชอาณาจักร เป็นตัวอย่างของการประยุกต์ใช้การสังเคราะห์เชิงระเบียบวิธี ตัวอย่างนี้แสดงให้เห็นว่าการมีแนวคิดเรื่องคู่ตรงข้ามในหลายแง่มุม เช่น คำอธิบาย หลักฐาน และเชิงเวลาสามารถช่วยลดความตึงเครียดทางระเบียบวิธีระหว่างสองแนวทางได้อย่างไร นอกจากนี้ยังเผยให้เห็นว่าการปรับปรุงประสิทธิภาพองค์กรไม่ใช่เรื่องทั้งหมดของการปรับโครงสร้างองค์กรของวิสาหกิจการรถไฟ แท้จริงแล้วกระบวนการสร้างความชอบธรรมและผลลัพธ์ที่ขัดแย้งกันมีความซับซ้อนทางสังคมและการเมืองมากกว่าการปรับปรุงประสิทธิภาพองค์กร กล่าวโดยสรุป บทความนี้มีส่วนสำคัญไม่เพียงแต่ในการอภิปรายว่าการวิจัยเชิงเอกสารสามารถนำมาใช้ในการสร้างเรื่องราวทางประวัติศาสตร์-เชิงสถาบันเกี่ยวกับพลวัตขององค์กรได้อย่างไร แต่ยังรวมถึงเหตุผลที่การศึกษาแบบกรณีศึกษาด้านการศึกษาองค์กรควรให้ความสำคัญมากขึ้นต่อการพัฒนาและการเปลี่ยนแปลงในอดีต-ซึ่งถือเป็นความร่วมมือทางระเบียบวิธีในสาขา

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¹ ผู้รับผิดชอบบทความหลัก,
วิทยาลัยโลกคดีศึกษา มหาวิทยาลัยธรรมศาสตร์ ศูนย์รังสิต ปทุมธานี 12121
santi@sgs.tu.ac.th

Introduction

In recent years, there has been growing interest in bringing together different research methodologies either to gain more insights or more completed picture of the issues (Wadhvani et al., 2018; Roulston 2019; Sonday et al., 2020; Heller, 2023; McKibben & Breheny, 2023). This is without exception to a use of case study approach in tandem with others (Smith et al., 2012) as well as a review on those seemingly underrated approaches like an archival study (Das et al., 2018). Yet, this is nothing to do with the creation of something entirely new. But rather as implicitly highlighted by Ostrom (2010) that “When the world we are trying to explain ... is not well described by a simple model, we must continue to improve our frameworks and theories so as to be able to understand complexity and not simply reject it”. It is rather about building upon the existing ones considering the emergent research issues.

With this recognition, the present article puts forward a discussion on a synthesis between the two methodological approaches which are a case study and archival research. However, the key premise is on enriching a case study one. Rather than offering a clear cut and definitive step by step to bring them together, it encourages researchers to critically examine rationale, application, and limitation of a case study approach and more crucially on how complementary features of an archival approach can be utilized. In doing so, methodological tensions caused by those different standpoints are discussed in tandem with a notion of dualism as paths forward. In order to solidify the article’s arguments and offer audiences the insights into this synthesis, a comprehensive account of research into British railways (BR) privatization is provided along with detailed discussion as the example. Indeed, unlike the findings offered by predominant research, a methodological synthesis argues that the BR’s organizational restructuring is far beyond a performance improvement rationale. It found that a legitimization process was pursued by a rhetorical strategy (a combination of logos, pathos, and ethos) and paradoxical results of restructuring seemed to emerge from a too much emphasis on regulative dimension and a taken for granted on norms and cultural mindset of the BR’s staff.

The paper is structured in six sections. The first part offers a comprehensive account of research issues in organizational dynamics whereas the second part deals particularly with contributions of a case approach in this field of study as well as its limitations. Then, an incorporation of historical paradigm into a case study is laid out as the third part of this paper following by discussions on methodological tensions between the two methodologies and their synthesis as ways forward. And yet, before a concluding remark is put as a final section, the fifth part of this paper on practical application of methodological synthesis is provided with the aim to enhance readers’

understanding. And then, a final section on discussion and conclusion is drawn as a wrap-up.

Organizational Dynamics: Underlying Problems and How They Should be Investigated

Most scholars frame organizations as being dynamics from at least two perspectives—‘*being*’ consisting of component parts that can be deleted or added and ‘*becoming*’ ever-changing flow process (van de Ven & Poole, 2005). Either ‘being’ or ‘becoming’, however, their centralities are reciprocated to understanding change but in complementary manner. Whilst the former one seeks to study it in terms of causation among variables (Schoonhoven et al., 1990), the latter one by contrast is focused on a sequence of events unfolding over time (Gersick, 1994). Only understanding factors causing changes and their correlation can be found vulnerable to criticisms of taking for granted a social constructionism process (Silverman, 2010; Bryman, 2012). Likewise, centering solely on an unfolding process of events receives scholarly remarks as being quite subjective in an interpretation (Smith, 2012). This observation helps remind us that different approaches to the research questions, which are influenced by their ontological stance, should not be justified against one another evidently. In fact, there can be a multitude of occasions where research is far too complex to be carried out by a single paradigm. Yet, there is no exception to the studies of organizational dynamics either.

According to the Cambridge dictionary the term ‘dynamics’ refers to forces that produce movement or change. In organizations, forces are usually exercised by those people inside via their interaction over time. Building upon this foundational concept, Stacey and Mowles (2016) noted that “organizational dynamics is largely concerned with the nature of interactions between people in an organization and also about the stable and changing patterns of behavior these interactions produce over time”. With this working definition that signifies an institutionalized and de-institutionalized process, the institutional theory and its branches have been adopted as theoretical frames for the studies e.g., the institutional change (Aulakh & Kotabe, 2008; Campbell, 2010; Mahoney & Thelen, 2010), the institutional logics and legitimacy (Deephouse, & Suchman, 2008), and the institutional work (Lawrence & Suddaby, 2006; Gawer, 2013).

Hence, it is not too much to say that organizational dynamics research entails change and resistance of people within the organizations as well as an acquisition and regain of new organizational legitimacy after being disrupted by surrounding context. Besides, a research’s premise should also include a [re-] configurations of value, resources and transactions for creating a new legitimized pathway of change (Pinkse

et al., 2023). So, any methodological approach to this research should be oriented towards capturing dynamics interaction of people within an organization as well as disentangling complexities of change process.

In addition to how the research questions should be addressed, the extent of control over behavioral events, and the focus either on contemporary or historical events are seen as crucial factors for methodological design (Ebneyamini et al., 2018). Unlike experimental research where a control is put in place, taking place in natural settings for researchers to access life at work as it occurs naturally is suggested for studying organizational dynamics and change (Golden-Biddle et al., 2006). For example, to understand how firms undertake organizational change, Vedel and Kokshagina (2021) adopted a longitudinal, comparative case study within which they were present in the situation they wanted to study. Furthermore, interrogating into contemporary issues as for example how and why organizations have transformed '*a generalization of knowledge*' rather than fabricating *a unique* historical narrative is another key concern for crafting up a relevant methodological approach. Yet, these considerations together with an ontological and epistemological stance wield an enormous influence on how the research questions in the field of organizational dynamics should be addressed.

Case Study and Its Methodological Issues in Organizational Dynamics Research

Historically, adopting a case study for scrutiny on organizational dynamics can be dated back to the 1960s. Alfred Chandler—an American professor of business history—used it to study a relationship between changing strategies and restructuring organizations of four large US companies. Multiple contexts within which strategic changes occurred and their consequences on the companies were explored contextually and in depth. This, in fact, allowed him to understand the dynamics at points in time of an interplay between changing strategies and restructuring of organization. Captured and revealed by a case method, Chandler found that growth induced by new strategies could trigger administrative problems and as a result, companies responded by re-formalizing techniques for administration and work allocation. Yet, they adapted by amending and revising their structures and channels of control (Mackay et al., 2020). With its features as discussed earlier, Pettigrew (1985) also employed a case study to understand the issues and process of organizational development within the chemical company ICI in the 1970s and early 1980s. Having had a series of interviews with the key actors and site visits to gather data in a real-life context, these enabled him to better understand the company's decisions and

actions by taking into consideration its contextual and historical settings. Others in following decades like Nadler et al., (1997) and Bennet and Bennet (2004) further applied a case study to explore an ongoing tension caused by strategic change and organizational restructuring. Since those days the premise of using a case method to study organizational dynamics has evolved both in terms of its applications and the areas for investigation.

In this field of studies, especially with a focus on restructuring and change as part and parcel of strategy implementation (Chandler, 1962; Mintzberg, 1981; Stacey & Mowles, 2016; Burke 2018), a case study research has been used extensively either as explanatory approach to gain an insight into a process and its implications (Chebbi et al., 2020; Vedel & Koshagima, 2021; Su et al., 2023) or exploratory means to capture complexities of the issues along with building and refining theories (Mostafa & Negm, 2018; Andrew, 2023; Cannavacciuolo et al., 2023). Methodologically, these applications are relevant with a critical aspect of [re-] designing organizational structure highlighted by Mintzberg (1981). In his view, any change caused by design is not only about adding or deleting organization ‘parts’ at will but also involves ‘mechanisms’ that hold them together. Consequently, coordination of activities and expectations within organizations will inevitably be altered, which leads to disruptions in organizational norms and routines (Vollmer, 2013).

The attempts and paradoxical results of privatization programs in Britain between 1980s and 2000s could be seen as the epitome of the above remarks. Some ‘part’ of organizations in the National Health Services (NHS) and the British Railways (BR) were rationalized and divested. Simultaneously, ‘coordinating mechanisms’ that have steered and directed a delivery of their services were crafted in the light of efficiency and performance improvement instead of a long-held public services ethos (Ferlie & Geraghty, 2007). If it is deployed properly, a case study could offer an in-depth understanding into an interaction between changes and reconfiguration after reconfiguration as a response to surrounding context (Clark, 2004). Here, a rich understanding of the context that has shaped strategies and galvanized change and [re-] design both parts and mechanisms will be obtained through a process of empirical investigation with a support from multiple sources of evidence (Saunders et al., 2009). The responses in terms of resistance and acceptance from the internal stakeholders can also be contextually explored along with the implications after a restructuring program has been put in place (Chebbi et al., 2020 and Vedel & Kokshagima, 2021).

Having understood the strengths offered by a case study approach, Andersson and Gadolin (2020) further applied it to investigate how the actors in public healthcare organizations had involved in building, sustaining, and tearing down their

institutionalized practices. With the merits in providing an in-depth understanding of the issues and process revealing, not only the outcomes, but a case study is also quite relevant with what the authors sought to investigate—‘about the actions’ that formed institutional practices rather than success or failure. Throughout a case’s compositional structure (see Yin, 2009), a story of institutionalized practices in healthcare organizations ‘laden with participant quotes’ from a qualitative analysis is portrayed as a lesson learnt.

Not only being deployed to study one organization in an in-depth manner, but a case study can also be applied for a comparative investigation. For example, Vedel and Kokshagina (2021) sought to reveal how a Danish pharmaceutical company and French–Italian semiconductor firm adjusted their organizational structures to align with the new strategic routes—a shift to more exploratory strategies. Longitudinal–comparative case studies were brought in with the aim to gain a zoom-in view of change process and mechanisms attempted to induce organizational restructuring that enhanced their adaptations to an exploratory outcome. Here, the issues under a research investigation do not seem to be objective and exterior. In fact, perhaps, like Berger and Luckman (1966) put, knowledge about strategies and organizational dynamics appears to be socially constructed and given meaning by those involved parties. Regarding these, a case study could help delve deeply into the interaction process where the issues were perceived, discussed, and practiced by key participants in the firms.

In general, qualitative studies appear to be appropriate for studying those critical areas pointed out by Mintzberg. This is because they allow researchers to understand how the issues are conceptualized, talked about and practiced. And in specific, a case study approach with its social constructivist epistemology could help interrogating into the complexities and implications of change as well as decisions and actions undertaken by the involved parties as change occurs. As Yin (2009) argued it is a convincing way for researchers to fully understand various complex social phenomena and real-life events including organizational change and dynamics and managerial process of a given organization (Cannavacciuolo et al., 2023; Su et al., 2023). Moreover, a case study itself can be deployed either to capture the situation at the moment in time ‘*a snapshot*’ known as cross-sectional study or to identify change and development over a period of time ‘*starting from the time being onwards*’ known as longitudinal study (Proverbs & Gameson, 2008). With these features, it has gradually taken a prominent role in business and management research as a relevant approach for analyzing and solving business problems as well as testing, refining and building theories (Dul & Hak, 2008).

Although the uses of a case study approach are methodologically relevant with those research issues discussed earlier, it can offer an insight into the situation only as a snapshot (Proverbs & Gameson, 2008; Saunders et al., 2009; Bryman, 2012). This remark runs counter to what Yin (2009) believed that a case study is appropriate for studying organizational and managerial *'processes'*, especially *'processes of change and development over times'*. An increase in bodies of research on 'use of the past' in organization studies and business management (Suddaby & Foster, 2017; Wadhwani et al.; 2023) seems to suggest that focusing on the moment in time may not be sufficient studying the issues of organizational dynamics. Heller (2023), for example, explored how historical sources such as the archives should be used for the studies in an appropriate way like the historians do e.g., identify, analyze and use bias in archival sources to craft reliable historical narratives. Yet, this is aligned with Maclean et al., (2016) contended "research should draw more extensively on historical data, methods and knowledge for the advancement of the field". With an incorporation of historical paradigm, the studies will be re-oriented towards a dynamic process not 'slice into discrete moments' (Bryant & Hall, 2005).

However, as noted by Braudel (1980) decades ago but still being evident these days. Many organization studies tend to downplay 'the exceptional value of long-time span'—privileging contemporary and cross-sectional studies covering limited times frame. Grounded on this epistemological stance, it has enormously influenced the way in which a case study is designed, conducted and implemented. So, this is seen as a methodological issue for using a case study in organizational dynamics research. In this regard, there is a need for a closer union between a methodological approach used in organizational studies and those deployed by historical research with the aim to generate a very productive line of inquiries into their synergies - how to enrich a case's finding by infusing a notion of 'historical process unfolding over times' into the studies (Das et al., 2016; Decker et al., 2018; Fowler & Gillett, 2021).

Incorporating a Historical Paradigm into a Case Study

Traditionally understood as being opposite in terms of acquiring knowledge e.g., an invasive vs a non-invasive technique in data collection and temporal focus e.g., a particular moment in time vs a notion of over time, a case study approach with its emphasis on discrete moments is thus unlikely to apprehend an enduring feature or changing process of organizations. Perhaps the most illustrative example can be thought of a cinematographic display where each frame, like each discrete moment or each cross-sectional case, is lined up successively in an immobile state, but get transformed into a moving scene when they are shot on to a screen (Chan &

Jintamanaskoon, 2013). So, with such linear analytic as compositional structure for a case report—beginning, middle and end, a retrospection in drawing on the past in making sense of the present is perceived as way to improve a narrative of storytelling presented in case studies (Dawson & Sykes, 2019). Yet, this is resonated with a remark made by Giddens (2009) “in order to understand social problems and institutional patterns currently existed, a renewed focus on the historical aspect was required because they are inextricably rooted in a development of the everyday lives and social interactions over times”. In this regard, it is not too much to say that a historical perspective (process unfolding) and a social sedimentation (archives) must be embraced into the heart of research investigation. Upon this point, archival research, which is one of the most in-depth research starts entering the scene.

This historical oriented methodology allows research questions which focus on the past and change over time to be answered whether exploratory, explanatory, or descriptive (Saunders et al., 2009). It is founded on above principles, specifically understood as logics of history (William & Sewell, 2005) and archival sedimentation (Berg and Lune, 2012). These two seem to demarcate archival research from other methodologies. It, first, looks for traces of the present—looking backward to interpret and to understand historical endeavor and situations through contemporary thoughts (Soderlund & Lenfle, 2013). In addition, the interpretations are often drawn from a flow of events that had been shaped by “turning points” and “watershed moments” rather than thinking about situations that exist randomly (William and Sewell, 2005). In short, the issues entailed in the organizational change process can be disentangled through a renewed focus on a flow of interactions among the involved parties. For the second principle, archival sedimentation that includes letters, diaries, confidential memos, lecture notes, transcripts, rough draft, unpublished manuscripts, and other organizational records, are believed to be rich of story about organizational change and restructuring. As Berg and Lune (2012) remark “What people do, how they behave and structure their daily lives, and even how humans are affected by certain principles can all be observed in traces people either intentionally or inadvertently leave behind”. Put it another way, those archival data offer an avenue for the studies that might otherwise be very difficult or impossible to investigate. Arguably, both ‘process unfolding’ and ‘archival sedimentation’ could hence enrich the research findings through an insight into a series of events and evidence left over times during the stakeholders’ interaction.

Having extended an investigation to encompass ‘process unfolding’ together with ‘a power of archives’, it could benefit a study in organizational dynamics in a three-pronged way: theoretical, epistemological and methodological (Mauthner et al.,

1998). For the first one, theoretical advantage, it permits researchers to draw together theories that have different emphases. In terms of epistemology, building upon a combined insight of two theoretical scaffoldings will inevitably influence sources of data, data collection techniques as well as interpretation. By incorporating a historical paradigm into a study, it is not only newly generated data that is needed but also those archival sedimentations. Consequently, both theoretical advantage and epistemological consideration can together lead to a methodological robustness. For instance, Abolafia (2010) with the aim to understand how a central bank thinks. Although research sought to explore a complex sense-making process of policy makers through a case study method, an epistemological awareness such as dualism of explanation—a narrative to analysis and a narrative construction—was embraced to put forward the study. Likewise, Gollnhofer and Bhatnagar (2021) by seemingly understood a power of archives hence a notion on dualism of evidence was taken as the essence. Here, in the study archival materials were consulted to reconstruct the origin and dynamic development of Germany food market by means of challenging and revising explanation. Without the use of archival sedimentations and still only be adhered to some forms of interviews, new insights on the “form and origins of contemporary phenomenon” would not have been discovered.

However, this approach appears to be an under-rated and under-utilized method in organization studies. Aguinis et al., (2009) found that over the last 20 years or so, archival research accounts for only around 10% of all research methods. Roulston (2019) also noted that qualitative research is less engaged with archival sources but prefers newly generated data. This seems to suggest that it should be used in a complementary manner for robustness and contextualization of any research in the study of business and organizations (Das et al., 2018). For example, Fowler and Gillett (2021) instead of relying solely on a case study approach to answer why and how London Transport had become a hybrid organization, the study utilized a power of archives in tandem with a historical institutionalism to trace change of institutional logics that had governed London Transport. In the same vein, Roberts and Geels (2019) combined an insight between a multi-level perspective and case study approach to identify conditions in which a transport sector was politically accelerated toward a transformation. Here, the archival materials and historical institutionalism were also brought in to enrich the research findings. Perhaps as North (1990) once argued “we cannot understand today’s choices without tracing the incremental evolution of institution”. With this in mind, embracing such a historical paradigm into a study of organizational dynamics appears to provide a more complete picture of why and how organizations make their decisions and react in the way they do.

But some criticisms can still be found. The first one is centered on how to interpret a corpus of data properly. Whilst a case study approach in organizational research relies heavily on a mechanic of coding e.g., fragmenting data into different chunks, relating them back and regrouping them, generalization of findings and theoretical propositions, archival research is less likely to maneuver by a coding process owing to its focus on uniqueness and particularity of historical narratives. Others such as Strati (2000) also notes “not properly a method of empirical organizational research because data and information are collected, rather than being directly generated in the course of particular research”. In this respect, the question on how to harness and/or reconcile a methodological tension between the two approaches must be further assessed and conceptualized. Like what Rowlinson et al., (2014) suggested a term ‘dualism’ of explanation, evidence and temporality must be consulted as for researchers to enrich their methodological robustness.

Methodological Tensions between the Two and Synthesis as Ways Forward

The attempts to synthesize and merge two methodologies have increasingly gained its premise over the years. For example, Sonday et al.(2020) proposed to merge a case study with a narrative inquiry. It is argued that a latter one could help ameliorate criticisms put on a case study such as: causing data fragmentation, [re-] categorization and unreliable interpretation. Although recognizing their different philosophical assumptions and suitability for each disciplinary, Steinmo (2018) called for an appropriate addition from experimental methods to those historical institutionalism paradigms. Inevitably, such an interface like this could yield methodological tensions and present challenges for researchers to overcome (Brennan, 2021). For this present paper, tensions could emerge as a result of forcing together disciplines that naturally fall in different directions. Historical research, in its traditional form, emphasizes the importance of narrative in the way that institutions develop, the role played by actors and circumstances including the influence of events (Beattie, 2009). In fact, ‘specifics’ and ‘particularities’ are forms of research findings historians and researchers in related fields seek to draw out. Organizational studies, by contrast, are directed towards extracting ‘pattern’ and ‘regularities’ from the mess of data—findings are generalized for others to be learnt (Adler et al., 2014). Indeed, this is a tension between ‘*specification*’ and ‘*generalization*’ form of knowledge.

Another tension can emerge from differences in data types between correctly generated data and the ones that naturally occur through a process of social interaction. Each of which has its own merit in providing an insight into the issues

being investigated but the acceptance can vary across disciplines. Even though there is criticism on not being constructed for a particular research investigation, on the flipside this can be a strength of archival material since it is quite unobtrusive/non-reactive data that tends to speak out the truth (Berg & Lune, 2012). As Lee (2000) noted “interviews and questionnaires create attitudes in part because respondents commonly try to manage impression of themselves in order to maintain their standing in the eyes of interviewers”. Hence, the archival materials seem to be least affected by this issue. From this perspective, there is a tension between ‘*constructed*’ and ‘*naturally occurred*’ type of data.

Tension between the two methodological approaches could also be found in association with a concern of ‘*how research questions in organizational change and dynamics should be answered*’. Offering an in-depth storytelling account with an emphasis on a dynamic at the moment in time is considered as an established way to illustrate research findings (Rashid et al., 2019). Such an account is often laden with participant quotes threaded together through a process of qualitative coding as a lesson learnt and insight (Bazeley, 2013). Essentially, with its interpretivism focus data will be fragmented, categorized and re-categorized to draw out its meaning as much as possible. Put it another way, chronology is not situated at the heart of case composition. This is found to be quite different from doing archival research. Instead of moving chunks of data around, grouping and re-grouping them to gain an insight into the issue being investigated, researching in the archives leans toward ‘chronology’-unfolded events over the time. With this practice, as argued by Corti (2007), it provides researchers with opportunities to also undertake comparative, follow up or restudies of the topics as well as to verify findings from other studies. Perhaps, one way to overcome this tension is mediated by the utility of each paradigm/account to other. For example, as Rule and John (2015) see case study can have theoretical implications either refining or building new ones. Yet, they can be further verified by using historical data such as the archives. This takes a resemblance to when economic historians have been known to interpret data of the past by using contemporary models and vice versa (Black & MacRaid, 2000).

Managing a balance between appreciating a slice of discrete moment and changes over time could occur at various points during the research process. Critically examining their tensions and harnessing them rigorously by means of synthesis shall render methodological robustness. Today’s decisions and actions of organization are not only investigated in the present context, but they are also studied as a series of past events unfolded.

Referring to Cambridge dictionary the word ‘synthesis’ means the act of combining different ideas or things to make a whole that is new and different from items considered separately. But this should be done with the caveat of methodological tensions as aforementioned above. Hence, a chasm between theory development expected from organization studies and historical veracity required by historical research must be explored from various aspects before a closer union is drawn. In doing so, an ontological and epistemological stance guiding methodological position must be examined. Table no.1 below shows a comparison between a case study approach and archival research in those respective areas including how they can be synthesized in a notion of ‘dualism’.

Table 1

Comparison Between Case Study Approach and Archival Research

Area for Comparison	How each methodological approach is different in each concerning area that could give rise to methodological tensions	Dualism of... as paths forward
Ontological stance	<u>Case study</u> : Subjectivism-oriented and theoretically framed to focus on discrete moments.	Dualism of explanation is a synthesized area for a path forward. For example, a result derived from the coding process can be enriched by a narrative construction of historical paradigm.
	<u>Archival research</u> : Subjectivism-oriented and historically grounded to unveil change and development processes.	
Epistemological stance	<u>Case study</u> : Social constructivism through a newly generated set of data.	Dualism of evidence where constructed data is used in tandem with documentary sources produced over time.
	<u>Archival research</u> : Social constructivism through a repository and sedimentations of social interactions.	
How research questions should be answered	<u>Case study</u> : An in-depth storytelling of dynamic interaction among actors at a point in time.	Dualism of temporality where a focus on discrete moments must consult a chronology of the process unfolded.
	<u>Archival research</u> : An illustration of unfolded events over time occurred by the involved parties.	
Type of data collection techniques and interpretation	<u>Case study</u> : A newly generated set of data, an invasive technique, and a mechanism of coding patterns and generalization.	Dualism of explanation, evidence, and temporality together provide a premise for synthesis.
	<u>Archival research</u> : A non-reactive type of data, archival sedimentations, and a narrative construction uniqueness.	

Since the present paper is focused on incorporating a historical paradigm into a case study, a synthesis is thus to mediate those four areas for comparison to a case approach. Researchers are encouraged to use historical perspective and material for insights—push a limit of understanding organizational dynamic. In fact, a synthesis

between the two is not strictly proceeded under certain instructions. It is characterized as state of art where the various forms of synthesis are dependent upon a re-assessment on those areas. For example, Gawer and Phillips (2013) adopt a dualism of temporality and evidence as a way of synthesis between an in-depth case study and historical paradigm. Likewise, Gollnhofer and Bhatnagar (2021) instead of appreciating a dynamic of discrete moment offered by a case study approach, an archival study is utilized to answer how the German food market had shifted. However, such a synthesis can face the issues of research ethics. Pearce (2018) notes that access to some sorts of archives might be prohibited owing to confidentiality concerns. But it is not in the premise of this article and might have been more discussed lengthily elsewhere.

Practical Application of Methodological Synthesis: Incorporating a Historical Paradigm to a Case Study of British Railways (BR) Privatization

This section is intended to provide a comprehensive account on how methodological synthesis was applied to disentangle complexities of the BR's (re-) organization. Such a research question as "how was the idea of BR's privatization dynamically legitimized?" and "why did an organizational restructuring - *privatization* - of BR face a paradoxical result?" were approached by a combined strengths between a case study "*dynamic at a particular point in time*" and a power of archives "*change and development over times*." Conventionally, a case study as a single approach appears to be appropriate for revealing a legitimization process of the BR's restructuring and an organizational disruption as its paradoxical result. This has resulted in existing research findings that predominantly argue performance improvement is entirely attributed to privatization (Jintamanaskoon, 2016). Yet, their temporal emphasis for research investigation is oriented toward a dynamic at a particular point in time. Figure 1 is an encapsulation of predominant research into a privatization of BR.

However, since BR's businesses were inevitably shaped and (re-) shaped by the successive governmental reform agenda as well as socio-economic conditions over the decades-long together with a notion of path-dependency and lock-in mechanism. Therefore, as remarked by Thelen (1999) that "historical institutionalism can help examining political and economic development in historical context and in terms of processes unfolding over time and in relation to each other, within a broader context in which developments in one realm impinge on and shape developments in others", incorporating a historical paradigm into the study shall help addressing the research questions in a more insightful and more completed picture.

Figure 1

Predominant Research into a Privatization of BR



Source: Santi Jintamanaskoon, *Privatization and the Industry Reform: an historical case study of British rail*, PhD Thesis, University of Manchester, 2016, page 48

Brief data collection and analysis process

In addition to carrying out a semi-structure interview as a main data gathering technique for a case study approach, collecting relevant data from the archives in systematic way is essential for this methodological synthesis. For validity and reliability of findings, a data triangulation was employed, various sources of archives were used to confirm the reliability and validity of information (Denzin, 1978). In addition, any archival data must be assessed to ensure quality of evidence. Scott (1990) suggested that it consists of authenticity, credibility, representativeness and meaning. Each of which is elaborated more in table 2 whilst table 3 illustrates the collected archives with their purposes.

Table 2*Construct of Valid and Reliable Archival Data*

Type of Construct	What to Consider
Authenticity	Is the evidence genuine and of questionable origin?' to avoid any error as well as distortions of what exactly happened in the issues focused on the research investigation.
Credibility	This is a matter of 'undistorted and sincerity.' Yet for the aspect of preventing a distorted picture in an understanding on BR's privatization, the study consulted a wide range of archival sources, not reliant upon any single one—the published, unpublished, the note and voices of public in general.
Representativeness	This criterion is about for example, in investigating a decision-making process the investigator would have to know whether the documents are complete or at least representative collection of all relevant archives. It helped the study overcoming what many scholarships in the history discipline named as 'a cheery picking' evidence.
Meaning	Is the evidence clear and comprehensible?

Source: Adapted from Scott (1990) *A Matter of Record*.

Fundamentally, archival sources were studied and interpreted in a contextual manner by 5W (Who was involved, what went on, where it all happened, why it happened, and when events took place) and 1H (How did a restructuring take place). By doing this, it enabled a researcher to start constructing a narrative account of privatization. Simultaneously, qualitative data coding from descriptive level to pattern level was also applied throughout a process of reading. Yet, this can be seen as *"dualism of explanation"* where coding process and a construction of historical account were synthesized.

Table 3

Sources of Archival Data and Their Purposes

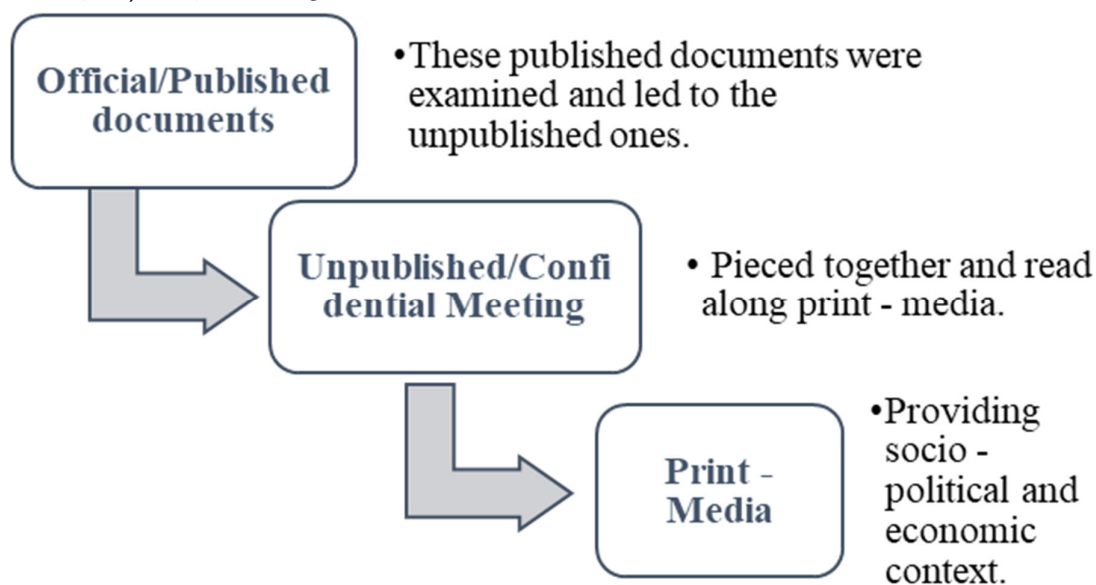
Description of data	Source of archival data	What purposes do these sources serve?
Official inquiry reports and policy papers (Published documents)	Various reports that were commissioned to investigate the issues and needs for privatization: Beeching report 1963; Joint Steering Group Committee 1967; The study of integrated transport in early 1970s; Ridley report 1977; and Serpell report 1984	Providing an account of the affair of the British railway Industry at the time, and enabling the research investigation to trace how the reform(s) of the sector took place and under what changing political, economic conditions
Confidential meeting notes (Unpublished documents)	Cabinet Office papers; Minutes of meeting in public office; Prime minister Office and social Correspondence (PREM); Memorandum by the Chancellor of the Exchequer; and Correspondence letters between the government departments and railway unions.	Enabling the research team to piece together the political narrative so as to facilitate an interpretation of the forces at play that influenced and shaped the mid-set of policymakers, and the roles play by key social actors in the BR at the time
Print-media and letters from industry practitioners and academics	Local and National Newspapers such as The Financial Times, The Times, The Economist, The Observers, The Daily Telegraph, Daily Mail and so on.	Enabling the study to get a snapshot of social conditions at the time, especially the response to the reforms of the BR.

Source: The author self-compilation

Figure no. 2 below illustrates systematic data collection process that moves from published/official documents to unpublished papers/notes and relevant print-media. However, it is not a linear and straight away process but can rather cycle back and forth.

Figure 2

A Step-By-Step Guiding Data Collection Process.



Source: Santi Jintamanaskoon, *Privatization and the Industry Reform: an historical case study of British rail*, PhD Thesis, University of Manchester, 2016, page 118

Here, “*dualism of evidence*” started to enter a scene as documentary sources (produced unobtrusively over times) could help gain a deeper insight into a process of legitimization and paradoxical results. Yet, it was not solely relying upon constructed data from the interview. Rather, they were used together hand in hand either to validate or question or even refine the existing research findings. At the same time, “*dualism of temporality*” was also applied to extend a temporal emphasis from discrete moment towards a chronology of process unfolded.

Building upon “*dualism of explanation*” “*dualism of evidence*” and “*dualism of temporality*” as aforementioned above along with the study’s theoretical framework–*institutional theory*, this led to a structured data analysis process as presented in figure no. 3, figure no. 4 and figure no.5. Whilst Figure 3 provides suggestions on how the archival data should be examined and structured in a chronology, Figures 4 and 5 are the epitome of qualitative data analysis–coding mechanism. This is where a methodological synthesis could enrich research into privatization of the BR.

Figure 3

How Archival Data was Structured to Enhance a Research Investigation.

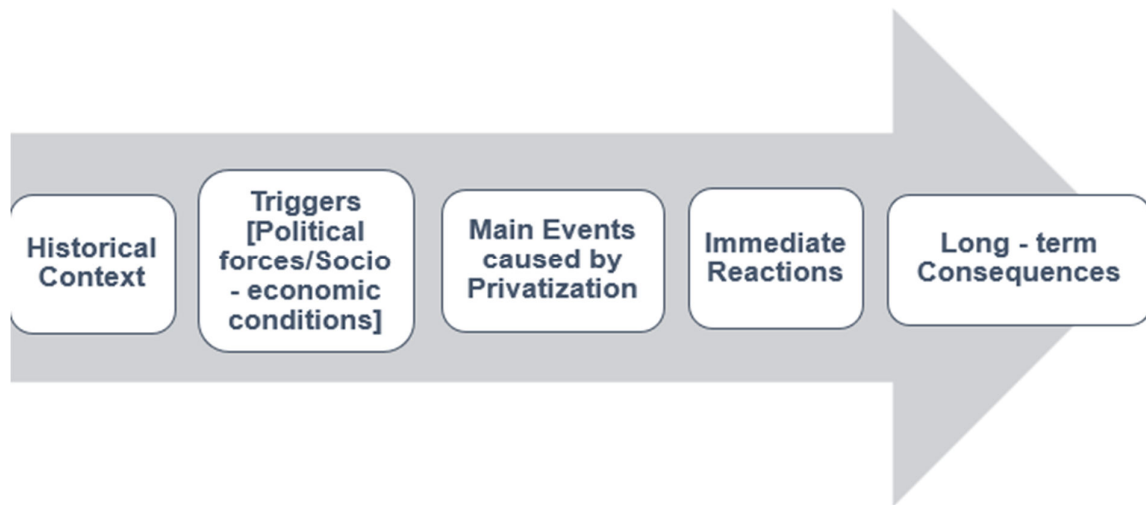


Figure 4

Coding Architect of Legitimization Process of BR.

(The initial sets of codes were derived from institutional legitimacy concept before expanding and be categorized as themes as research progressed.)

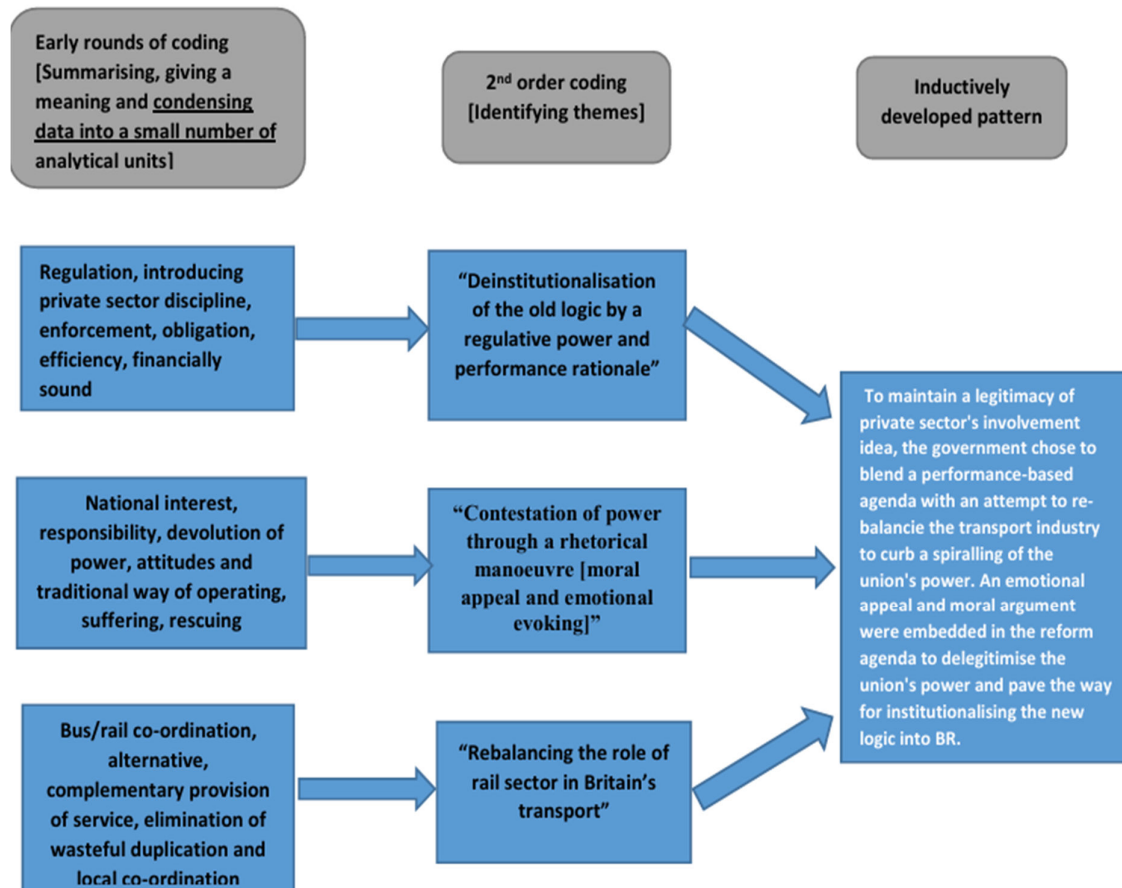
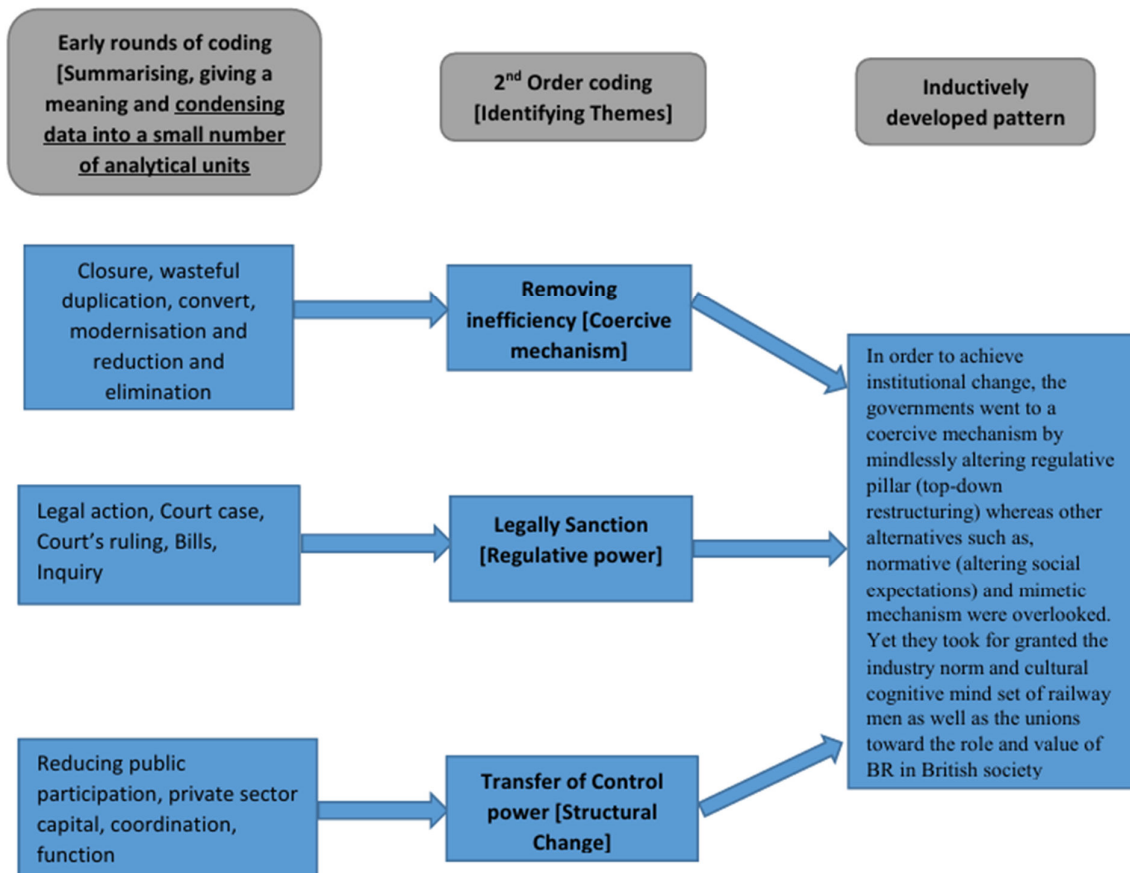


Figure 5

Coding Architect of Paradoxical Results of BR's Privatization.

(The initial sets of codes were derived from the three institutional fibers.)



Methodologically speaking, figure no.3, no.4 and no.5 were largely influenced by a notion of “*dualism of explanation*” where coding process and a construction of historical narrative enriched each other. Indeed, research finding for each question suggested that privatization of the British railways (BR) was far beyond a performance improvement. And seeking to work only regulation with authority to do so was not effective enough to get BR’s organizational restructuring done. Norm and cultural belief on how the BR should be run and organized must also be addressed simultaneously by a rhetorical strategy (a combination of logos, pathos, and ethos) to avoid disruption as a paradoxical result of BR’s privatization. These would not have been unveiled, if only a focus on discrete moments at particular point in time had been deployed to the study.

In short, this section has demonstrated how a study on BR’s organizational restructuring process could be enhanced by a methodological synthesis and a rationale to do so. In addition, other two crucial dimensions have also been elaborated

and that include the example of sources of archival data with their purposes and a construct of their validity and reliability. Indeed, other research in organizational studies and dynamics as well as strategic management shall benefit from this application in three ways. First, it is a (re-) reconsideration on a temporal emphasis of methodological approach as an alternative for research investigation. Second, it is a realization that any present result such as strategic decision-making, a strategic choice or a current form of structure, might not be a result of current climates and dynamism. In fact, it might have been resulted by change and development of surrounding context over time. And finally, it is inevitable for methodological synthesis to encounter tensions since each approach comes from different philosophical positions. In this regard, if a synthesis is to be pursued, the issues of methodological tensions must be tackled.

Discussion and Conclusion

A key emphasis of this article is centered around methodological contribution to enhance the studies on organizational dynamics research. Having explored those underlying problems in this field, the article has then discussed why a case study with its focus on discrete moment is unlikely to yield a completed picture of the issues being investigated. It argues that the approach often takes for granted an overextending past that could wield an enormous influence on the present. To address methodological issues, researchers are encouraged to incorporate a historical paradigm such as archival research into a case study. Still, there are other facets waiting for them to grapple with, in terms of methodological tensions that could occur at various point during a process. Here, a notion of dualism of explanation, evidence and temporality are suggested as paths forward for a methodological synthesis and yet have been further elaborated via a practical application section: incorporating a historical paradigm into a case study of British railways (BR) privatization. Although it is only a comprehensive account seeking to provide an overview on how the two methodologies can be synthesized, how a synthesis could help enrich the study are also discussed in detail. However, this paper is by no means prescribing what to do in merging them together neatly or strongly recommending it as a panacea for methodological advancement. In fact, the attempt here is to push the limits in a critical and reflective manner. Expectedly, it should help researchers to consider and reconsider their choice(s) of methodologies and start to think that their studies are not always strictly limited to any single or just one approach.

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