Editorial

One of the main purposes of any serious academic journal is that of fostering genuine debate about the key issues of our society. This is what we witness in the first article in this issue. In a study entitled, "Towards advancing African management scholarship", Kevin Ibeh (Birkbeck, University of London), Joseph Eyong (De Montfort University, UK) and Kenneth Amaeshi, European University Institute, Florence) provide a vigorous reply to Grietjie Verhoef's article, published in our final issue of 2021: "The management discourse: collective or strategic performance drive." Verhoef's article, in turn, can be seen as a continuance of a debate launched by the special issue edited by Leon Prieto and Simone Phipps in 2020, *Black Business and Management History*? At stake in this debate are some fundamental issues. Is there a unique "African" form of management that is far more "communalist" and "humanist" than mainstream "Western" forms of management? Or, alternatively, as Verhoef argues, is Africa characterized by such diversity as to make the concept of "African" management one of very dubious veracity? Who, in fact, are "Africans? These are questions that are germane to not only the African experience but also to the substantial "African diaspora" that can today be found in virtually every nation on the planet.

Central to the debate that we witness in the recent issues of *JMH* is the concept of *ubuntu*, the belief that "Africa" has a distinct style of management that is more "collectivist" and "humanist" than traditional "Western" management systems. This is something that Ibeh, Eyong and Amaeshi believe in, albeit with a significant caveat, observing as they do that, "we reiterate our agreement with Verhoef's view that African management concepts, the most famous of which is *Ubuntu*, need more robust research to evidence their efficacy." By contrast, Verheof rejects the possibility that there can be a single "African identity", given the fact that "Africa is ethnically diverse, having multiple cultures, and more than 1000 languages." The debate as to whether there is a single "Pan-African" identity, it should be noted, has been around a long time. In his, *The Wretched of the Earth,* Franz Fanon – the West Indian-born leader of the Algerian Revolution – articulated an unrelenting hostility to European colonialism. Fanon, nevertheless, was dismissive of efforts to create an "Arab" or "African" culture in opposition to the West, condemning these campaigns as ones destined to lead "into a blind alley". In the diversity of Africa, there was, he concluded, "no common destiny to be shared between the national cultures of Senegal and Guinea". Or any other African society. By contrast, the African-American intellectual, W.E.B. Du Bois was a believer in a single Pan-African identity, using his article "A future for Pan-Africa: Freedom, peace and socialism" to call for a rebuilding of Africa on a "socialism founded on old African communal life". The position canvassed by Ibeh, Eyong and Amaeshi is a nuanced one; they support the forging of a defining African identity but emphasise the need for complementary sub-identities. If the debate as to the existence or otherwise of a unique "African" identity is an old one, it clearly has a greater resonance today than at any time in the past. In providing a forum for this important debate, *JMH* anticipates that this important discussion will continue to occur within this journal in a constructive and thoughtful way.

Our second article by Pierre-Yves Donzé (Osaka University, Japan) and Shigehiro Nishimura (Kansai University, Japan) is, by any estimation, an important article. It covers a number of themes that are seminal to our understanding of business and management history: the development of the electrical industry, the international use of patents, the differing investment and export strategies of two electrical giants (Germany's Siemens and the United States' General Electric) and the industrialization of Japan. The significance of

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the electrical industry and a handful of corporate giants – Siemens, General Electric (GE), Westinghouse, AEG, Koninklijke Philips – to the emergence of new science-based business orders has long been appreciated. Writing at the dawn of the twentieth century, the Russian revolution, Vladimir Lenin, for example, observed in his *Imperialism, the Highest Stage of Capitalism* that the "electrical industry" was emblematic of "the modern technical achievements of capitalism." Central to the commercial success of the great twentieth-century electrical giants, Donzé and Nishimura, conclusively demonstrate, was the management of their ever-increasing number of patents. At Siemens, the number of patents that were registered annually rose from twelve in the mid-1880s to 130 in 1899. As the reach of the great electrical companies became global in nature, each was confronted with a fundamental question: should the company maintain centralized control of its patents or should it register them locally through either subsidiaries or local business partners? The answer to this question, Donzé and Nishimura demonstrate, went to the core of the global business strategy of the great electrical companies. If one was to engage in foreign direct investment and offshore manufacturing, the local registration of patents was more or less a necessity. Conversely, centralized patent registration implied reliance on exports rather than localized manufacturing. As Donzé and Nishimura highlight, the former strategy was favored by GE and the latter by Siemens. In Japan, GE entrusted local patents registration from 1919 to two local partners in whom it had previously made a substantial investment: Tokyo Electric and Shibaura Engineering – two firms that were to eventually merge into an entity we now know as Toshiba. So significant was the Japanese market that even Siemens was eventually forced to abandon its reliance on exports, investing in a local firm, Furukawa, that eventually morphed into Fuji Electric and Fujistsu. Whereas these local entities were responsible for only 6.4% of Siemens sales in Japan in 1925, by 1933, their production comprised 90% of the total. The importance of the Japanese market can be demonstrated by the fact that, as Donzé and Nishimura note, "Japan was the only country in the world where Siemens" managed its patents through local partners, in whom it had acquired a 30% investment stake. What we have here, in short, is an important story, one that draws on a great depth of both archival research and historical understanding. Indeed, of the articles that *JMH* has published in recent years, there are few that can match this article in both qualities of research and scholarly insight.

Our third article in this issue, "Technology, Market Change and Privatisation of communication", continues our discussion of technology and market strategy. Authored by Edward Smith (Wokingham, UK), this fine article traces the history of British telecommunications from its birth in the private sector, through its years of state ownership (1912–1984), to its eventual reemergence as a privatized entity, British Telecom in 1984. At one level, Smith's story is a tale of monopolization and its effects. Although both telegraphs and telephones emerged from the private sector, each soon came under full or partial state control. Telegraphy was absorbed into the British Post Office (BPO) in 1869. In 1880, the BPO also asserted its monopoly rights over telephones, issuing licenses and collecting royalties. Within this highly-regulated environment, the National Telephone Company (NTC) soon exercised *de facto* control, gaining a 90% market share. Associated with poor-quality services and high prices, NTC's trunk network was nationalized in 1892. In 1905, the government also agreed to buy NTC's infrastructure when its license expired in 1911. As a sub-branch of the BPO, telecommunications was destined to often play second-fiddle to the main postal business. The inadequate investment was the near-inevitable result. As Smith notes, "Policy decisions taken in the 1950s and 1960s left the BPO with an outdated, maintenance hungry, physical, dusty and oily exchange technology system, known as Strowger." In 1980, most British telephones were still dependent upon this dated electromechanical infrastructure. Removed from BPO control in 1981, BT, as it became known, was privatized in 1984 amid a technological transformation of the telecommunications sector. By 1993, labour costs were overtaken by other operating costs in the BT budget, forcing BT to engage in a greater focus on costs. Amid ongoing price controls, BT shed 40% of its staff in the early 1990s as it modernized and ever-greater efficiencies were demanded. In reflecting on these seminal changes, Smith concludes that the effects of the years of state ownership were detrimental for investment in the British telecommunications sector, an outcome that held "back the industry, its suppliers, customers and the market." What is evident from Smith's well-written account is that British telecommunications have suffered a problematic history, often ill-served by both monopolistic private control as well as public ownership.

The fourth article in this issue represents a continuation of the debate as to the work of James March that was inaugurated by the Special Issue on March that was published in the previous issue of *JMH*. Authored by Jean-Etienne Joullié (Ecole de Management Léonard de Vinci, Paris La defense and Laval Université, Quebec) and Robert Spillane (Macquarie University, Australia) and entitled "'Physics Envy' in Organisation Studies: the Case of James G. March", this article takes a more critical view of March's work than was the norm in our Special Issue. In engaging in a "critical review" of March's work, Joullié and Spillane defend two positions, both of which will no doubt prove controversial. First, they hold that, "March's work rests on positivist and behaviorist foundations and exemplifies the "physics envy" from which most of his peers have suffered since the early 1960s." Secondly, they argue that "March's writings [. . .] cannot be reconciled with their epistemological and psychological underpinnings." A generous reader could be tempted to excuse inconsistencies and shortcomings in March's work as reflecting the fact that much of his work was co-authored and that he had to compromise, i.e. to accept views that were not his own. Not so for Joullié and Spillane, who note, "March left no statement in his books and articles about his agreement or disagreement with his co-authors." To prosecute their case, Joullié and Spillane make salient March's self-acknowledged "behaviorism" and (largely unacknowledged) "positivism". Together, these two conceptual premises caused March to believe that human behavior is eminently predictable. Constantly, the idea that human behaviour is eminently predictable is extended from the individual to the firm. For example, in the *Behavioral Theory of the Firm* – a study March co-authored with Richard Cyert – the reader is subject to "pages containing mathematical equations that would not be out of place in physics or electrical engineering textbooks." The problem with this line of thinking, as Joullié and Spillane note, is that human behaviour is seldom automatic. Rather, it is a result of choices. It is thus a fallacy to link behaviours simply to psychological reactions when, in truth, it is a product of a complex array of personal, organizational and contextual factors. Such alternative understanding appears in March's work when employees are said to be "free-choosing, goal-developing and decision-making individuals endowed with reason." In other words, March sometimes treats individuals and firms as "organisms" that behave according to mathematic formulae; at other times, a reverse appraisal is argued by March. This ambiguity and confusion are also reflected, it is argued, in March's failure even to provide a consistent definition of what he meant by the term "organization". In their conclusion, Joullié and Spillane extend their critique from March to the wider problems of both "positivism" and the "anti-positivist" and "postmodernist" schools that have emerged in opposition. In doing so, they argue in favour of what they call a "non-positivist" approach, one grounded in a philosophical appreciation of both "existence" and the contextual "environment" at centre stage. Well-researched and clearly written, Joullié and Spillane's analysis is one that will, no doubt, find both detractors and supporters. It is, however, clearly an important contribution to the debate initiated by the recent Special Issue.

Our fifth article in this issue, "Accounting Controls at the Society of Jesus – 1646 to 2005" is by Martin Quinn (Queen's University, Belfast), João Oliveira (University of Porto, Portugal) and Alicia Santidrián (University of Burgos, Spain). As the title suggests, this article explores the financial management systems of one of the Catholic Church's most-famed religious orders – the Society of Jesus or Jesuits. As a teaching order, the Jesuits have been regarded as both the most intellectual of the Catholic orders and also the one associated with the highest standards of lay teaching. Whereas other orders have often struggled for members, the Jesuits have steadily grown in number. By 2019, the order boasted 16,000 members, an eight-fold increase in the number recorded in 1945. Associated with an expansion of its educational remit, the growth of both the Jesuits and their lay educational institutions never came cheap. Indeed, it required large and often complex funding mechanisms. As Quinn, Oliveira and Santidrián note, the significance of the various Catholic orders is one that has long been appreciated by business and management historians. Within this journal, fine articles have been written by Katya Rost *et al.* (2010) and Peter Wirtz (2017) on the Benedictine and Dominican orders. Where this study differs from earlier works is in the ways it highlights the importance of formal "Instructions" in the internal administration of the Jesuits, most notably the "Instruction on Temporal Administration" (ITA) and its institutional successor, the "Instruction on the Administration of Goods" (IAG). Together, the ITA/IAG have provided the basis for the Jesuits internal accounting control systems since 1646. As Quinn, Oliveira and Santidrián observe, it was the "indebtedness" of the Society's colleges that necessitated action in the first place. In essence, the Instructions provided a standardized reporting process that submitted each individual Jesuit "House" to the authority of the regional "Provincial". Each "Provincial", in turn, was subject to the scrutiny of the Society's "General". As one would expect, the "Instructions" were subject to what is described as "an evolutionary change process". Increasingly, Quinn, Oliveira and Santidrián observe, "this change process gradually encapsulated secular accounting and management concepts". One of the most interesting findings of this study is the ways in which the Jesuits have developed more elaborate accounting controls than other Catholic orders. In 2005, for example, the Jesuits' IAG went to 201 pages, while that for the Cistercians was only five pages in length. In large part, the authors suggest, this much more rigorous accounting system reflects the "institutional pressures" that stem from running well-resourced lay educational schools and colleges. In doing so, they conclude, "the Jesuits through their instructions/accounting control rules have not traded religion for bureaucracy; instead, they have put each in two tightly connected 'iron cages', with the former functioning as a foundation for the latter." As such, the Jesuits have managed to strike a unique balance between spiritual ideals and the practical necessities of the secular world.

In the penultimate article in this issue, "The Diffusion of Management Fads: A Popularization Perspective", Irene Pollach (Aarhus University, Denmark) casts doubt on the common belief that the worlds of academia and business exist in isolation from each other. Whereas previous research suggests little interaction between academia and business practice, Pollach believes this research has paid insufficient heed to the popular diffusion of "management fads" – a category of ideas and practices that Pollach defines as ones that gain a wide following but which are also "transient" and "ephemeral" in nature. Drawing on what she refers to as a more "contemporary view of popularization", Pollach argues that "the academic and the practitioner domains" do not exist in self-contained silos. Instead, they exist as "intertwined discourse communities"; communities that tend to "read the same books and articles . . . publish in the same journals and . . . even interact with each other at conferences." The boundaries between academia and the world of the business practitioner are thus porous and fluid rather than rigid. Of particular importance, Pollach argues, are what are referred to as "popularization journals" such as *Harvard Business Review* and the *MIT Sloan Management Review* that attract both readers and authors from both academia and business. In exploring the interaction of academia and business in the "life cycles" of management fads, Pollach, therefore, focuses on how eight "fads" (balance scorecard, business process engineering, design thinking, knowledge management, learning organizations, matrix organizations, management by objectives, total quality management) were created and sustained by both academic and "popularization" journals over a 50-year period. In addition to looking at trends in three "popularization" journals (*Harvard Business Review, MIT Sloan Management Review* and *California Management Review*), 13 leading journals from the British Business Dean's journal list were examined as prime exemplars of this trend. Of the eight "fads" examined by Pollach, five (design thinking, knowledge management, learning organizations, management by objectives, total quality management) were embraced by both "popularization" and academic journals. Conversely, three (balance scorecard, business process engineering, matrix organizations, matrix organizations) were embraced by either academic or "popularization" journals, but not both. Among some fads (i.e. management by objectives), the life-cycle of the fad is broadly similar in both "popularization" and academic journals. In the case of total quality management, however, uptake of the concept initially occurred on a more significant scale in the popular domain. By contrast, "design thinking", although originating in academia, quickly achieved a much greater following in the three journals with a more popular orientation. Collectively, Pollach's insights and analysis provides a novel, interesting and important addition to our understanding of how ideas are generated, sustained and lose force in both the academic and practitioner worlds. As readers will appreciate, this is also a very substantial study, the product of a huge amount of research and collation. It stands many of our assumptions on their head.

The final work in this issue, "Performing Intersectional Identity Work over Time: the Historic Case of Viola Turner", is a case study that explores how a female African-American insurance executive negotiated the tension between intersecting identities and moral foundational values at the dawn of the twentieth century. A product of six authors – Madison Portie-Williamson (At-Bay, New York), David Marshall (University of Dayton, USA), Albert Mills (St. Mary's University, Halifax, Canada and ta-Suomen yliopisto, Kuopio, Finland), Milorad Novicevic (University of Mississippi, USA) and Caleb Lugar (University of Mississippi, USA) – this study is notable for the ways in which it combines empirical rigor with novel theoretical understandings of identity. Central to this article is the concept of "intersectionality", which the authors define as the "simultaneous confluence of power relations can engender a sense of marginalization and/or privilege that shapes people's identities and the way in which they are expected to perform their identities and relationships." Also central to this article is "moral foundations theory" and the idea that identity is also forged by "the building blocks of moral identity: care/harm, fairness/cheating, loyalty/betrayal, authority/subversion and purity or sanctity/degradation." What is most notable about this fine article is the way in which the authors bring these concepts to life in tracing the experiences of Viola Turner. An African-American born into a poor Southern town (Macon, GA), Turner suffered discrimination at many different levels: as an African-American, a woman, a person from an impoverished region. Despite this, she rose to be the first Vice-President of the North Carolina Mutual Life Insurance Company, an institution created by African-Americans to service the needs of their community. Inevitably, these experiences shaped her moral values, which shifted as her career circumstances altered. Based on oral interviewers conducted with Turner in 1979, the authors conclude that the moral values of "authority" and "fairness" were more pronounced characteristics of Turner as a child than as an adult professional: an outcome which they attribute to the fact that, as an adult, "the gendered hierarchical culture of her organization, the NCMLIC, was permeated with hegemonic male values." Conversely, her sensitivity to the foundational values of care/harm and purity/degradation became more pronounced over time. As someone who was married three times, the significance of the latter reflected the need to maintain a sense of decorum and respect in an inherently conservative industry and society. Significantly, Turner's feelings of intergroup loyalties to the African-American community were strongest when she was a young adult and a college student – including a period spent at the Booker T. Washington-founded Tuskegee Institute – rather than a mature professional. What thus emerges from this article is a complex story and a complex series of interactions between contextual circumstances and moral values. As the authors conclude, though often-oppressive "social institutional structures existed throughout Turner's life, their affect or power on intersecting identities and the resulting identity work performed were more (less) intense at various life stages." As they also observe, "This is an important finding to furthering intersectional identity work as it means that the interaction of macro structures and micro identities can present at one time disadvantages and another time advantages to individuals".

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