Editorial

We would like to welcome you again to another issue of the *Journal of Management History*. Before, we move onto the synopsis of the articles, we would like to make a few announcements. First, we would like to make an announcement of our two new special issues. The first special issue is a commemoration, criticism and analysis of Wren and Bedeian's *The Evolution of Management Thought*, for 50 years the standard text on management history. The second special issues are on the history of entrepreneurship. Our second announcement is that we are encouraging authors to submit historically minded literature reviews to the journal to further our understanding of management practice. Our third announcement will be our relaunching of the book review section. If you wish to review a book, please e-mail our Book Review Editor, Andrew Cardow. We will make further announcements on the future direction of the journal. We believe the following set of articles reflects the high rigor and critical posture of the journal.

In all areas of life, matters relating to individual and cultural identity are increasingly at the forefront of debate. Perhaps, nowhere is this more evident than in discussions relating to African business and management and the impact of African ideas among the continent's large diaspora.

It is to this debate as to the nature of "African management" and what it is to be an "African" that our first article speaks. Authored by Grietjie Verhoef (Professor of Business, Economic and Accounting History at the University of Johannesburg, South Africa) and entitled "The Management Discourse: Collective or Strategic Performance Drive?," this article begins by asking a number of fundamental questions, namely:

> Is there something distinctly identifiable as "Africanness" in management in Africa? What is African? Who are Africans? How does the continent account for its diverse people, cultures and languages?

In exploring answers to these questions, Verhoef notes the growing tendency to treat "Blackness" and "Africanness" as if they were synonyms. The result of this tendency, Verhoef argues, is a "nativist" understanding of African identity, one which makes the concept of *Ubuntu* to understandings of "African management." According to its proponents, *Ubuntu* is a "uniquely African" concept and practice, one that emphasizes "human interdependence, driven by norms of reciprocity, suppression of self-interest and the virtue of symbiosis." However, despite its centrality to understanding as to the supposed uniqueness of "African management," Verhoef argues that there is little evidence to suggest universality of support even within "Black" Africa. "Nor is there proof," Verhoef argues, "of a universal preference for collectivism as opposed to individualism." Indeed, Verhoef notes, although managers in Ghana, Cameroon, Senegal and Tanzania score highly in surveys measuring "collectivist" values, those in Senegal express levels of individualism similar to that found in the USA. "On the notion of 'sharing,'" Verhoef continues, "the USA and Zimbabwe scored 45, as opposed to a higher score of 62 and above by managers in Ghana, Cameroon, Senegal and Tanzania." In challenging the whole notion of *Ubuntu*, Verhoef also raises fundamental issues as to the "Africanness" of ethnic and racial groups drawn from nonBlack communities. In doing so, she poses the following question:

> What about the long tradition of Lebanese businesspeople operating in Ghana, the Indian businesses in several East African states such as Kenya, Uganda and Tanzania, the Chinese

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> businesspeople in South Africa? Despite their absence from the literature and the discourse, these constituent peoples of Africa all contribute to the rich diversity of management cultures of Africa.

As Editors of this journal, we recognize that the issues that Verhoef raises are fundamental to our understanding of management and management history not only in Africa but also in what she refers to as the African "Diaspora." Accordingly, we are hoping to make the *Journal of Management History* a central platform for this debate in which voices from both sides will be given a platform. To facilitate this debate, we have therefore asked Professor Kevin Ibeh, Pro-Vice-Chancellor (International) at Birkbeck, University of London, to respond to Verhoef's article. Ibeh has kindly agreed to do so, and we anticipate that this counter will be published in issue no 2 in 2022.

In our second article, "Cultural earning process: lessons from microhistory," we explore "cultural intelligence" (CQ) from a "microhistory" perspective. Authored by Tianyuan Yu (Mount Saint Vincent University, Halifax, Canada, and Albert Mills (Saint Mary's University, Halifax, Canada, and Department of Business, Ita-Suomen yliopisto, Kuopio, Finland), this study makes fascinating use of the personal memoirs of a Pan-American (Pan Am) executive, Harold Bixby. The largest airline in the world between 1927 and its collapse in 1991, Pan Am was an innovator. And within Pan Am, Bixby stood out for his entrepreneurial flair. Prior to joining Pan Am, while working for a St. Louis bank, Bixby was responsible for underwriting Charles Lindbergh's solo crossing of the Atlantic. Then, between 1933 and 1938, Bixby worked as Pan Am's agent in China, running a joint venture between Pan Am and the Chinese Nationalist Government: the China National Aviation Corporation. In this role, Yu and Mills observe, "Bixby was inevitably entangled in the power and politics of an embattled China and actually became part of the power dynamics, negotiating and creating histories." For Bixby, success in such an environment involved an "intense cultural learning process." In explaining Bixby's success in terms of CQ, Yu and Mills note the ways in which the literature in the field has suffered from a reliance on quantitative surveys, typically conducted over short time frames and involving "students instead of business expatriates." Missing from the literature are "historical studies" conducted "over a prolonged period of time." By drawing on a "microhistory" approach that locates Bixby and CQ in a dynamic rather than a static context, this study certainly demonstrates the superiority of an historical methodology. In doing so, Yu and Mills link the success of Pan Am's joint venture to Bixby's highly developed CQ skills. "Bixby demonstrated," Yu and Mills conclude, "unusual knowledge in the areas of China's history, social norms and values, cultural classics, folklore and legends, geography, economy and political systems. He had a keen appreciation of the social zeitgeist in China." Central to Bixby's success was a sense of intellectual curiosity. Before leaving for China, he read all he could. On arriving there, he never passed up an opportunity to mingle and interact with Chinese drawn from every walk of life. In short, CQ was not incidental to his success. It was seminal. For their part, Yu and Mills also achieve success on multiple levels with their article. Not only do they demonstrate the utility of a "metahistorical" approach to CQ, but they also give us unique insights into both Chinese society and the entrepreneurial flair of Pan Am during the 1930s.

Our third article also involves an exploration of a complex cultural phenomenon in a study entitled "The lepers, lunatics, the lame, the blind, the infirm and the making of asylums and benevolent charities: the Indian merchant class and disability in colonial India."

Authored by Sanjukta Choudhury Kaul (Bina Nusantara University, Jakarta), Manjit Singh Sandhu (Monash University Malaysia, Bandar Sunway, Malaysia) and Quamrul Alam (Central Queensland University, Melbourne), this fine article begins with a simple but accurate observation. Although people with a disability make up 15% of the world's population, the "rich, long, oppressive history of disability has" been "invisible within management history research." To help fill this void, Kaul, Sandhu and Alam undertake an historical inquiry into the "business response to disability in 19th-century colonial India." Using institutional theory, Kaul, Sandhu and Alam place the cultural interaction between Indian business and the British Raj at the center of their analysis. And key to this interaction, it is argued, was the Indian Companies Act of 1850, which caused a displacement of the old merchant class by new family-dominated mercantile firms. Over time, both Hindu and Muslim charitable endowments also became part of the new corporate landscaping, registering as either public charitable organization or not-for-profit companies. At the same time, those with disabilities – most particularly mental disabilities – were also brought within the legislative and institutional net. Laws such as the *Lunatic Asylum Act in India of 1858* heralded a fundamentally new approach to the mentally ill, a group that had previously avoided institutional regulation. Central to this new legislative approach, it is argued, was the British Raj's intent to "civilize" India in its own image. "Prison, workhouses and asylums," Kaul, Sandhu and Alam observe, "formed a triangulated nexus that supported the British mission to 'internally civilize.'" For Indian merchants and businesspeople, who had historically played a key role in the "temple as well as the bazaar," this institutional reshaping also had profound effects. Whereas merchants had donated to religious institutions, so were merchants praised by the religious for their piety and generosity. Under the Raj, this pattern of social recognition became more complex as charitable activity took on a more formal appearance. In way of example, the authors point to the experience of Jamshetjee Jejee Bhoy (1783-1859), the leading Bombay-based Parsee merchant, of Zoroastrian faith, who "was knighted in 1842 as colonial India's first baronet, in recognition of his services and acts of charity." Through such systems of Imperial reward and recognition, charity and the plight of the disabled became intertwined with the interests of the Raj. As for the disabled, they found themselves increasingly relocated from family and community placements to institutionalized settings. At the end of the day, however, one senses that the Raj never had the resources necessary to replicate the institutional frameworks found in Britain. The result was that the disabled found themselves in a netherworld, enjoying neither the full benefits of traditional support networks nor that found in an industrialized Western society.

Our fourth article, "Making a Hybrid out of a Crisis: Historical Contingency and the Institutional Logics of London's Public Transport Monopoly," takes us to the complexities of public transport in London during the 1930s. Authored by James Fowler (University of Essex) and Alex Gillett (University of York), this article exemplifies business and management history at its best. Drawing on a truly impressive body of archival research, Fowler and Gillett examine the unification of London's transport system with a critical eye. In the process, they systematically dismantle all earlier explanations, which had linked unification with economic need and a search for "efficiency." As Fowler and Gillett's introductory pages suggest, the apparent logic for this earlier conclusion is self-evident. In the 1920s, the organization of London's public transport system was outwardly chaotic. The London County Council and a set of London Borough Councils were each responsible for their own jurisdictions. Only able to operate tramway systems due to legal restrictions, some chose to become providers while others did not. By contrast, bus and railway operations were in private hands. To complicate matters further, the Corporation of the City of London exercised power of veto over the all-important inner square mile. However, as Fowler and Gillett reveal, 91% of gross transport revenues were generated by two privately owned railways and the London County Council tramway system. Each of these three operations were, moreover, in a reasonably strong financial position. Why then was there a need to amalgamate all operations into the London Passenger Transport Board in 1933? Explanation is provided by examining the intersections of economics, politics and industrial relations. In the early 1920s, the already complex market situation became even more fraught because of competition from so-called "pirate buses," unregulated operators who added 20 buses per week to the transport mix. Undercutting existing operators, their entry into the market provoked a generalized transport strike in 1924. And it was this, Fowler and Gillett argue, that proved "the decisive moment in the drive to unification." Commercial interests favoring unification were now joined by the union representing bus and tram workers, the powerful Transport and General Workers' Union. The barely disguised intent of this alliance was not efficiency so much as the protection of "profits and wages." In providing a new analysis of the unification of London's transport system, Fowler and Gillett also bring fresh insight into the literature on "hybrid" organizations. Whereas the "hybrid" literature emerged to explain the movement away from state-owned enterprises in the 1980s, this account traces movement in the opposite direction, i.e. toward greater levels of governmental control. In short, at every level, Fowler and Gillett challenge accepted understandings in what is an exemplary and groundbreaking piece of research.

The fifth article in this edition is entitled "Debunking Ford's Relation to the Past: History as 'Bunk' in Emersonian Perspective" and begins with the observation that Henry Ford's "life, career and management style remain subjects of sustained fascination because his motivations and actions are shrouded in paradox." In exploring the paradox that is Ford, the author of this fine and superbly written article, Peter Watt (Lancaster University, Leipzig), argues that the key to understanding Ford's place in history is a comprehension of Ford's own view of history. In Watt's estimation, Ford's off-cited comment that "History is more or less bunk" was not a "philistine remark, but in fact a statement that points to a specific historiographical position." Indeed, far from being disinterested in history, Ford was guided by a "transcendental" historical viewpoint that betrayed the influence of the 19th-century philosopher, Ralph Waldo Emerson. It was this philosophical sense of history, grounded in an Emersonian perspective, Watt argues, that caused Ford to devote so much time and money to historical projects, notably his Greenfield Village "living history" site and the Henry Ford Museum. Like Friedrich Nietzsche, Emerson dismissed academic history and institutional religion, placing emphasis instead on "self," "self-reliance" and individual achievement. Unlike Nietzsche, however, Emerson also believed that nature was pervaded by a "transcendental" spiritual essence. Emerson also differed from Nietzsche in his emphasis on "American identity," associating the USA with unique cultural attributes that emphasized innovation and economic progress. Like his English contemporary, Thomas Carlyle, Emerson also placed emphasis on individual capacity to reshape history, declaring: "Every true man is a cause, a country, and an age." When Ford declared that "history is more or less bunk," Watt argues that Ford was therefore not denying the historical past but rather advocating an Emersonian vision that emphasized individual action and "American identity" as the flagbearer of human progress. It was these values and a desire to extend "history" from the "privileged few towards a mass consumer market," Watt notes in conclusion, that caused Ford to open his Greenfield Village historical site in 1929. In short, Watt effectively dispels notions that Ford was a crude materialist, little interested in either ideas or history. And in taking the reader in a voyage of discovery into an aspect of Ford that few would know about, Watt does so in an exemplary fashion, welding narrative and philosophical discussion in ways that captures the reader's attention from beginning to end.

In our penultimate article, Jan Langhof and Stefan Güldenberg (University of Liechtenstein) reexamine one of the seminal events in Second World War, the attempted assassination of Adolf Hitler and the overthrow of his Nazi regime in the July 1944 plot known to history as "Operation Valkyrie." Bringing a fresh analysis to a well-known story in an article entitled, "Whom to Serve? Exploring the moral Dimension of Servant Leadership: Answers from Operation Valkyrie," Langhof and Güldenberg raise fundamental questions as to ethics, the nature of leadership and the concept of a "servant leader." Superficially, the decision to assassinate Hitler appears an unquestionably moral decision. However, as Langhof and Güldenberg make clear, matters were not as simple as they appear. The principal figure in the plot, Colonel Claus Schenk Graf von Stauffenberg, was deeply religious. Aware that his bombing risked the lives of others besides Hitler, von Stauffenberg feared for his immortal soul. Drawing upon the moral dilemma that von Stauffenberg's faced, Langhof and Güldenberg ask whether the concept of a "servant leader" would have provided assistance to the would-be plotters and others facing difficult choices. Their response is "no," an answer that is aimed to deliberately cast doubt on the "recent literature about ethics and leadership." As Langhof and Güldenberg accurately note, within this literature the concept of "servant leader" (i.e. one who serves the interests of those below them in the organizational hierarchy), there is a tendency to portray it "as a panacea to any ethical issues and moral dilemmas." In the case of von Stauffenberg, however, Langhof and Güldenberg query which possible interests he would have served as a tyrannicide. Claims to act on behalf of either the German soldiery or "people" were, Langhof and Güldenberg observe, inherently "ambiguous." "Even if the servant leader is sensitive to the fact that injustice is happening," they suggest, the question remains: "who actually decides on what is right and what is wrong?" This, they conclude, is the fundamental problem with the concept of a "servant leader" when stripped of "a specific value system" and the "moral foundation" that precedes it." Rather than providing a model for action in critical circumstances," servant leadership stripped of a moral compass remains "up in the air," posing as much a danger as a source of succor.

Our final article in this issue is by Armen Petrosyan (Institute for Business Consulting, Tver, Russian Federation) and is second part of his *magnus opus* into the nature of business, management and slavery in late Republican and Imperial Rome. Entitled "The germ of capitalism (Roman business through slave as the primordium of private enterprise). Part II. A counterpart of corporation," this article takes off where his early article – published in Vol. 27, No. 2 – left off. In starting his discussion in this article, Petrosyan draws a key distinction between an "enterprise" and "entrepreneurship," using ancient Rome's wealthiest man, Crassus, as an example. When Crassus bought up "burnt-out estates together with neighboring lands for a song" from their distressed owners, Petrosyan observes, we witness an example of "entrepreneurship." There is, however, no "enterprise" involved as Crassus is "in command of his funds, instead of transmitting them to someone else, within an order established by law." Petrosyan also notes how scope for independent private-sector businesses was shaped by the importance of state-funded contracts (most notably for construction projects) and slave-operated *latifundia*. Both favored the rich and the politically well-connected at the expense of what Petrosyan refers to as "petty property." Rome did witness the emergence of public corporations with their own legal identity. These were partnerships whereby people bought shares in businesses that worked on state contracts (*societates publicanorum*). Such businesses enjoyed the status of a "judicial person," able to sue and be sued. However, the independence of these corporations was subject to major restrictions in the late Republican era. Indeed, "Corporate activity without permission from the state was considered a great crime to be harshly punished." Largely restricted to public projects and mining ventures, such highly regulated entities were ill-suited to the needs of small-scale entrepreneurs. As corporations were of public nature, they were neither interesting nor accessible to private business. That is why, it was fain to contrive an alternative form of conducting affairs which, remaining within the framework of law, could retain the main corporate attribute vital to major capital owners, namely, the limited liability for the debts and obligations incurred. The solution to this, Petrosyan argues, was the "business" slave entrusted with assets (*peculium*). Although the slave had operational control of these assets, legally they could only be used in the master's interests. "On the other hand," Petrosyan notes, "the master could not limit the slave's discretion while it remained within the tasks of peculium." In other words, what we have is a *de facto* enterprise where the assets are under independent control of a slave "director" operating within a regulated legal framework. Typically sharing in the profits generated by the *peculium* – profits a part of which could be used to purchase their freedom – the "business" slave was also incentivized to engage in profit maximization. In short, Petrosyan argues, far from being an archaic form of social organization, the Roman business slave system contained within it the "germ of capitalism."

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