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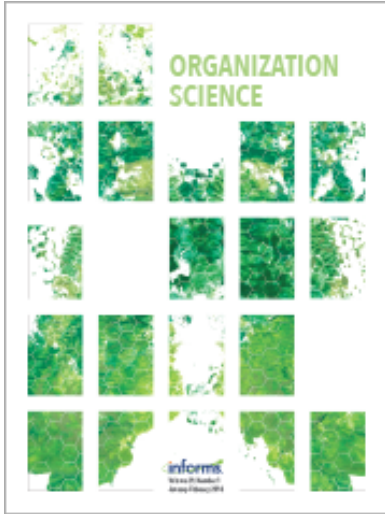
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Ideology in Vicarious Learning–Related Communication

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Abstract. Organizations often learn vicariously by observing what other organizations do. Our study examines vicarious learning–related communication through which individuals share their observations with other organizational members. Most students and members of present-day organizations would expect that this communication is driven by a prodevelopment logic—that communication serves the purpose of organizational improvement and competitiveness. Our unique historical evidence on learning-related communication over multiple decades shows that the subjective and collective attitude toward prodevelopment communication may be ideologically conditioned. Prodevelopment communication is the norm in capitalist organizations, but competing ideologies may emphasize other goals higher than organizational development. Consequently, increasing challenges to capitalism as the ideological basis of economic organization can have deep impacts on how organizations learn and produce innovations in the future.



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Introduction

Vicarious learning, the process of generating new knowledge through observing rather than experiencing (e.g., Bandura 1977), is an important mechanism of organizational adaptation and change. According to March and Simon (1993, p. 209), “Most innovations in an organization are a result of borrowing rather than invention.” Because observation ultimately occurs through individuals’ sensory organs, organization-level vicarious learning usually presupposes some form of communication between the observing individuals¹ and other organizational members.² This study contributes to our understanding of organizational communication in the context of vicarious learning by elucidating the ideological underpinnings of the associated communication practices.

That communication is essential in organizational vicarious learning is widely accepted across different streams of strategy and organizational research (e.g., Daft and Huber 1986, Cohen and Levinthal 1990, Fang et al. 2014). In general, much of the research is premised on the notion that the managers’ task is, first, to establish a set of communication channels that allow relevant information to flow across the organization, thus enabling collective learning based on what individuals and groups observe or experience (e.g., Narver and Slater 1990, Ocasio 1997, Rulke and

Galaskiewicz 2000). Second, the job of managers is to ensure that individuals use formal and informal channels effectively. This involves fostering an organizational culture in which it is safe to speak up (e.g., Detert and Edmondson 2011, Vuori and Huy 2016). Having a learning-friendly culture is important because organizational learning usually entails going against the organizational status quo by collectively recognizing shortcomings in current practices, strategies, and/or levels of performance (Fang et al. 2014). What Tarakci et al. (2018, p. 1140) call “divergent strategic behavior” is enabled, they suggest, by individuals’ identification with the organization and also by their personal interest to move ahead (Burgelman 1991, Floyd and Wooldridge 1997, Mantere 2008).

We argue that choices pertaining to vicarious learning–related communication are thoroughly ideological. In the context of vicarious learning, ideology may define what is reasonable, legitimate, or just “natural” to express—based on one’s observations—and how to express these. Ideology is, thus, one of the factors that shape how vicarious learning manifests at the level of communication practices. Communication practices may, in turn, shape how organizational attention is directed (Ocasio et al. 2018) and balance between consensus and dissensus (Abdallah and Langley 2014) and what the organization consequently learns

(Fiol 1994, Argote and Miron-Spektor 2011). That organizational behavior is, in general, ideological comes as no surprise to scholars familiar with the relevant literature (e.g., Starbuck 1982, Weiss and Miller 1987, Park et al. 2020). However, the ideological dimension of vicarious learning has gone largely unnoticed because firms in an industry tend to be “relatively homogenous in their commitment to capitalism’s ideology” (Ingram and Simons 2000, p. 45).³ This is, in part, the result of capitalism facing decreasing competition from alternative political ideologies (Simons and Ingram 2000, Winn 2015, Martin 2016), especially since the collapse of the Soviet Union (Tsoukas 1994, Hodgson 2002).

Our work builds on well-established notions in organization and management theory. On the one hand, we build on literature that sees communication as a tool for maintaining, changing, and reproducing (organizational) ideologies (e.g., Mumby 1989, Thomas 1998). In this view, vicarious learning–related communication is not just a step in a process of absorbing new knowledge from outside the firm’s boundaries (Cohen and Levinthal 1990), but also a reflection of organizational members’ deep-rooted beliefs about the organization and society more generally (e.g., Oakes et al. 1998, Hodges and Coronado 2006). On the other hand, we draw inspiration from research that has examined ideologically “unusual” organizations—for example, former for-profit companies in socialist regimes (Kogut and Zander 2000) and organizations founded on the premises of Utopian ideologies but operating within the context of market capitalism (Ingram and Simons 2000). Overall, these studies reveal that ideology can have significant effects on the ways in which organizations function.

Despite ideology’s potential importance in shaping vicarious learning–related communication, for the involved actors, ideology is not generally open for reflection. This is because ideology is fundamental to human subjectivity and agency (e.g., Mumby 1989), not just a filter preventing people from seeing the world “as it is” or a force inhibiting people from saying what they “really” think. This makes detecting ideology’s impact difficult. In order to examine how ideology matters, we performed a comparative analysis across ideologically heterogeneous organizations. We studied vicarious learning processes across four competing organizations in the Finnish grocery retailing industry: “travels of learning” (with a focus on international travel to “more advanced” countries), conducted for the purposes of fostering organizational development. Two of the organizations followed a capitalist ideology, one was a socialist cooperative, and the fourth one a consumer cooperative. The primary empirical material consists of more than 100 travel reports and related documents, which functioned as a

formal vehicle for communicating the travelers’ observations to the rest of the organization.

An idealistic view of vicarious learning would suggest that the reports are littered with audacious ideas for organizational development. However, previous literature on organizational communication hints that there could be several factors limiting what could be expressed in writing in the travel reports for reasons ranging from the observing individuals’ capacity to grasp what they see (Brandenburger and Vinokurova 2012) to their ability to express their thoughts in writing in a way that is understandable and acceptable to the recipients of the reports (e.g., Carlile 2004, Detert and Edmondson 2011, Szulanski et al. 2016). The evidence is consistent with these expectations as well. More interestingly, we find that the communication practices of travelers in some of the organizations deviated dramatically from what might be considered reasonable normative expectations, assumed tacitly by most literature (e.g., Kaplan and Norton 1996, Thomas et al. 2001). We expect that organizational members who are instructed and paid to travel to a foreign destination, perform observational activities, and report their findings will, in fact, do so, offering more or less radical recommendations for the sponsoring organization in the process. Yet we discovered that the frequency of this logic, what we call *prodevelopment communication*, systematically varied across organizations. Especially in one of the four organizations (i.e., the consumer cooperative), there appeared to be very little organizational pressure to communicate anything of value to the organization. The primary logic of travel reporting was what we call *procohesion communication*, which involves maintaining organizational stability rather than initiating change. Our study seeks to explain the perplexing finding that the organizations, despite being competitors in the same industry, were so different in how their observing individuals engaged in prodevelopment versus procohesion behaviors.

The theoretically important argument we make pertains to the ideological dimension of vicarious learning–related communication. Ideology, as an *internalized model*, may influence the subjective urge to engage in prodevelopment communication in the context of vicarious learning. Ideology may also shape vicarious learning–related communication *through the organizational context*: ideology is materialized in organizational design and governance solutions, which, in turn, influence how the observing individual perceives the prospects initiating organizational learning. We argue that these prospects are, in turn, related to the observing individuals’ (lack of) prodevelopment communication. In light of our evidence, capitalism seems to be more strongly associated with prodevelopment communication than other ideologies

observed in the study. The contemporary relevance of our historical study is that, although capitalism is ideologically well aligned with prodevelopment communication, for better or worse, competing political ideologies may promote different structural solutions, communication practices, and ideas about organizational learning.

Theoretical Background

This study focuses on the communication practices in the context of vicarious learning. We use ideas from the strategy-as-practice perspective (Whittington 2006, Vaara and Whittington 2012, Vaara and Lamberg 2016, Jarzabkowski et al. 2019) and practice theory more generally (e.g., Giddens 1986, Schatzki 2002). Social practices can be understood in terms of shared understandings concerning what kind of actions constitute a practice, rules and restrictions on the actions within a practice, and the broader goals and aims that performing a practice seeks to promote (e.g., Schatzki 2005). We focus our attention on what organizational members do within a vicarious learning process (Bresman 2013) to complement research focusing on the conditions and consequences of learning (e.g., Denrell 2003, Ryall 2009, Bingham and Davis 2012, Posen and Chen 2013).

We define organizational learning as changes in the collective beliefs and social practices of an organization. Vicarious learning is a special kind of organizational learning, which involves the gathering of information through observational means (Huber 1991). Organizational communication is the stream of messages that flows between organizational members, typically but not necessarily touching on matters pertaining to the organization and its environment. Although individuals could, in principle, communicate whatever and however, this does not happen in practice. Individual acts of communication draw on relatively stable, albeit potentially changing, communication practices (Carbaugh 2007). Building on Schatzki (2002, 2005), we see that these practices reflect organizational members' largely tacit understandings of what is involved in vicarious learning-related communication. Communication practices may also reflect explicit rules and restrictions pertaining to communication (e.g., reporting guidelines) as well as organizational members' understanding of the broader goals that the communication seeks to promote (e.g., organizational development, social cohesion).

The importance of communication in organization-level vicarious learning is intuitive. Any attempt to induce organizational learning through observational means involves specific individual bodies undertaking physical observational activities, resulting in stimuli for collective learning. For the individual- and group-level observations, experiences, and thoughts

to have organizational impacts, however, the observing individuals must somehow express their impressions and opinions to others. Generally, this entails that the observing individuals translate their observations to "imagery or verbal coding" (Manz and Sims 1981, p. 107).⁴

Most of the literature touching on the communication aspect of vicarious learning assumes that communication "filters" learning stimuli. Some of this literature focuses on the structural conditions required by effective communication (e.g., Cohen and Levinthal 1990). Others have considered "softer" elements in shaping communication. For example, Szulanski et al. (2004) emphasize trustworthiness of the senders of new information. In their case study of Nokia, Vuori and Huy (2016) argue that the organizational culture of fear caused middle managers to withhold negative information from the top management. Finally, there can be individual-level reasons to communicate, modify, or withhold information (Burgelman 1991, Tarakci et al. 2018) with potentially important consequences for organization-level learning (e.g., Fang et al. 2014, Schilling and Fang 2014).

Yet the tacit assumption behind all this is that, given favorable organizational circumstances, observing individuals voluntarily engage in pro-organizational communicative behaviors (Detert and Edmondson 2011)—that is, they use what they observe to initiate and catalyze organizational change for the (perceivably) better. Although this type of behavior may seem "self-evidently rational" (Hodge and Coronado 2006, p. 534), it has an ideological basis. In contemporary Western society, that organizational members subjugate themselves to the incessant pursuit of greater organizational effectiveness and efficiency reflects an internalized model of Weberian capitalism (Weber 2005 [1930] see also Chiapello and Fairclough 2002). As Giddens (2005, p. xi) states, "A rationalised capitalistic enterprise implies two things: a disciplined labour force, and the regularised investment of capital. [...] The regular reproduction of capital, involving its continual investment and reinvestment for the end of economic efficiency, is foreign to traditional types of enterprise."

Through our empirical analysis, we came to see vicarious learning-related communication as an expression of the deep-rooted values, norms, and beliefs that were central to being a member of the organization in question. Communication practices of the kind expected by most scholars could then be expressive of specific ideologies, such as market capitalism.

Following Ingram and Simons (2000), we define ideology as a set of beliefs about the nature of the social world, about the desirability of different outcomes, and about the efficacy and appropriateness of different actions in pursuing desirable ends.

Competing ideologies represent, more broadly, differing views on desirable ordering of the social world (Weiss and Miller 1987). Although ideological competition is occasionally ostensive, most people are usually unaware of how their thoughts and actions reflect particular ideologies. Ideologies become internalized through habituation and social interaction (e.g., Ashforth and Kreiner 1999) and constitute a fundamental aspect of human subjectivity (e.g., Mumby 1989).

We have relatively little research on the relationship between ideology and organizational learning. Boje's (1994) study on the effect of premodern, modern, and postmodern styles of learning is, to our knowledge, among the very few attempts to theorize the effect of ideological differences on learning. Some studies also treat organizational learning as ideology (Coopey 1995). The small amount of attention given to ideology is reasonable under the assumption that all organizations have a shared ideology (Ingram and Simons 2000). Most of the literature interested in organizational learning and related processes implicitly assumes this. However, when we broaden our scope to include neglected literature questioning the ideological homogeneity, it becomes apparent that capitalism and means–end rationality (Kalberg 1980) are relatively recent and history-specific characteristics of organizations.⁵

The specific ideologies of interest in our study are capitalism, socialism, and cooperativism (e.g., Nilsson 1985). Weber's (2005 [1930]) work is among the most influential works on *capitalism*. According to Weber (2005), the “spirit of capitalism” emerged as a delayed side effect of the Protestant Reformation of Christianity in the 16th century. With the Protestant Reformation, hard work and, subsequently, the accumulation of wealth came to signal—for Calvinists, in particular—that the person in question was God's chosen one. The virtuousness of wealth accumulation for its own sake was later secularized and became a defining feature of capitalistic societies. That relentless profit making became culturally acceptable has been cited as the very reason for the hockey stick–like economic growth of the past two centuries (McCloskey 2010; however, see Greif and Mokyr 2016). McCloskey's (2013) apologies for capitalism aside, contemporary research in the field of management and organizations is usually critical of capitalism. Chiapello and Fairclough (2002, p. 186) capture the ethos of this research, writing “The ‘spirit of capitalism’ is the ideology that justifies people's commitment to capitalism [...] Capitalistic accumulation requires commitment from many people, although few have any real chances of making a substantial profit.”

Other studies include those by Böhm et al. (2012) and Martin (2016), which highlight capitalism's

negative effects on the natural environment. Likewise, Adler (2001) questions the capability of competitive capitalism to form the basis of knowledge-intensive production (see also Kieser 2001, Stephens 2001). Boddy et al. (2015) argue that capitalism promotes psychopaths to positions of power, who return the favor by creating toxic work environments. The critical voices within academia as well as events such as the financial crisis of 2008 have, subsequently, caused management scholars to question capitalism's legitimacy (Phan et al. 2016). For example, the theme of the Academy of Management Annual Meeting in 2013 was “capitalism in question.” However, Phan et al. (2016, p. 120) argue that, in searching for alternatives to capitalism, “it is also important to compare the effectiveness and adaptability of different economic systems.”

Socialism has received far less attention from management and organizational scholars. In one sense, socialism is the opposite of capitalism because of its emphasis on concrete goals rather than abstract rules (Tsoukas 1994). According to Tsoukas (1994, p. 25), socialist movements aim for “the satisfaction of human needs rather than the satisfaction of the profit motive.” Moreover, Hodgson (2002, p. 33) writes, “[...] socialists have traditionally rejected the market because it led to competition, greed, inequality and exploitation. Socialists have believed that markets could be abolished by replacing them with all-embracing, rational institutions of evaluation, planning, and control.”

In the absence of markets, socialism implies coordination of economic activity through a combination of democratic decision making and bureaucratic controls. Because economic incentives to incite contributions are, by definition, weak, ideological control is key. For example, the *Communist Manifesto* called for “equal liability of all to work” (Marx and Engels 2010, p. 26). This may be taken as both a prescription to use coercive mechanisms (e.g., laws) to incite contributions and also a statement of an ideology in which every person is obliged to contribute to the collective good. In this vein, accounts of Utopian–socialist organizations, such as the kibbutzim (Simons and Ingram 2000) or the Shakers (Schatzki 2002), demonstrate how ideological valorization of work and individual effort serves to motivate participation in productive activities in the absence of high-powered incentives.

Most proponents of capitalism readily assume that differences in governance render socialist organizations inherently inferior to capitalist organizations. However, empirical research on the subject paints a more nuanced picture. One important set of studies on socialist organizations is Ingram and Simon's work on the kibbutzim (Ingram and Simons 2000;

Simons and Ingram 2000, 2003, 2004). We can learn from the kibbutzim that socialist organizations can exhibit “notable robustness and adaptiveness” and even outperform their capitalist rivals (Simons and Ingram 2000, p. 334). Thus, the failure of socialist organizations may, in part, be the product of ideological competition, not only the result of their inherent inferiority in competition for resources (Simons and Ingram 2003, 2004). Adding to a more nuanced understanding of socialist organizations is Kogut and Zander’s (2000) study of the splitting of Carl Zeiss when Germany was divided after the Second World War. Kogut and Zander (2000) argue that, although socialist organizations have the ability to develop new technological competencies, the political interference of the state and, at the system level, the absence of a market of complementary assets (see, e.g., Teece 1986) can make it difficult to specialize and build the unique competitive advantages required in international competition.

Finally, *cooperativism* has taken different forms depending on historical and sociopolitical contexts (Hilson 2017). However, the origins of the cooperative movement are anticapitalist: initially, cooperatives aimed to circumvent capitalistic entrepreneurs and companies for enhancing the welfare of their members (Hodgson 2002, Hilson 2017). In late 19th-century England and in other countries (Finland included), labor families concentrated their purchases of groceries and other basic items on cooperatives that were managed and patronized by individuals with a labor background; cooperatives were, thus, both prolabor and anticapitalist (Hilson et al. 2017a). Hodgson (2002) emphasizes that the ideological origins of both the cooperative movement and socialism date to the 18th-century Enlightenment and have significant overlaps. For example, cooperativism and socialism are both concerned with “common concrete goals” (Tsoukas 1994, p. 26, emphasis in the original) rather than “regularised investment of capital” (Giddens 2005, p. xi) and “abstract rules” (Tsoukas 1994, p. 26, emphasis in the original) as is characteristic of capitalism. One of the implications of this for cooperative governance is that “Share capital should receive only a strictly limited rate of interest, if any,” as stipulated in the *Essential Principles of Co-operative Organization* (Axworthy 1977, p. 139). Members benefit from cooperation in concrete terms (e.g., acquiring household items at reasonable prices) rather than in terms of wealth accumulation. Another domain of overlap between cooperativism and socialism is the use of democratic decision making for governance—the principle of “one member, one vote” (Axworthy 1977, p. 139)—in contrast to the property rights-based governance in capitalist organizations.

Although there is considerable heterogeneity between cooperatives within and across countries, the Rochdale principles have shaped cooperative organizations globally—for example, in the United Kingdom (the home of the Rochdale Society of Equitable Pioneers), mainland Europe, and the United States (e.g., Conover 1959). As such, they help understand the ideology of cooperativism. Besides eschewing profits (for their own sake) and endorsing the principle of democratic governance, one principle is that “a definite percentage of profits should be allotted to education” (Fairbairn 1994, p. 47). This norm remains today as one of the principles of the International Co-Operative Association (ICA).⁶ Axworthy (1977, p. 143) notes how, without education, there is a risk that “the co-operative becomes little more than a discount store.” Broadly speaking, education has a dual role in co-operatives: on the one hand, to equip stakeholders with the necessary knowledge and skills to effectively contribute to the functioning of cooperative organizations and, on the other hand, to persuade different audiences about the importance and benefits of cooperatives to society.

Over time, cooperatives lost many characteristics of the original ideological core as different political contexts and national institutions pushed cooperatives in varying directions. In some countries, such as Turkey and the Soviet Union, cooperatives became a part of the governmental economic system, whereas in other countries (notably Scandinavia), cooperatives continued to exist as a distinct organizational form. During the era of our study, these Scandinavian cooperatives still followed many of the original Rochdale principles, yet immediately afterward, strategic aims to survive in the pressure of market competition took over and pushed cooperatives to become more predictable business organizations with organizational goals and performance expectations (Skurnik 2002). Before this great turn in the 1980s, an individual member was still the core of all activities as were democratic principles in governance. Accordingly, the *organization*, as such, had no other goals than the enhanced welfare of its members and an ability to survive in market competition.

There is little research on cooperatives in the field of management and organizations. Being an important organizational form historically, business historians have studied cooperative organizations extensively (see, for example, the edited book by Hilson et al. 2017b). For example, Ekberg (2012) traces the divergent development paths of the cooperative movement in Western Europe. He argues the differing survival rates of cooperatives across European countries can be traced to the cooperatives’ ability to adapt to disruptive technological changes in retailing.

The study indicates the cooperative ideology can be a hindrance in adapting to technological change and that surviving cooperatives have had “to re-evaluate and re-state successfully their ideological profile in order to remain an attractive provider of retail services among increasingly affluent post-war consumers” (Ekberg 2012, p. 1007). However, ideological reasons can also explain why cooperatives continue to exist even though capitalism and the corporate organizational form have seemingly “won.” Boone and Özcan’s (2014) study of the U.S. bio-ethanol industry argues that an anticorporate climate in a local community can increase cooperative founding rates despite economic disincentives in the form of competitive pressure from capitalist corporations.

Our goal is to elucidate how the capitalist, socialist, and cooperative ideologies shape vicarious learning-related organizational communication. In our empirical work, we interpret ideology from two conceptual angles. First, ideology may influence organizational behavior as an *internalized model*. In this line of thinking, ideology is “not simply as a set of beliefs or values [...] but rather as that which constitutes the very subjectivity, or consciousness of every social actor” (Mumby 1989, p. 302). Organizational members internalize the ideology in terms of “what *is*, what *is* good, and what *is* possible [...] [closing] off certain possible perceptions and courses of action, while simultaneously allowing for creative participation within a system” (Mumby 1989, p. 300). In so doing, organizational members express the ideology through their actions, most importantly in the ways they use language. Second, ideology shapes behavior *through organizing*. As shown in extant historical and comparative studies (e.g., Tsoukas 1994, Ingram and Simons 2000, Kogut and Zander 2000), ideology is reflected in choices about organizational structures, governance, and leadership principles, which, in turn, are reflected in the behaviors of individual organizational members.

Method

Earlier studies on organizational learning-related communication have used simulation techniques (e.g., Schilling and Fang 2014), qualitative case studies (Vuori and Huy 2016), and quantitative empirical research (Szulanski 1996) to investigate the causes and consequences of communication. Our research strategy is to perform a comparative historical analysis of four organizations, which differ markedly in terms of the ideological reasons for their establishment. Our study follows the logic of theory elaboration process. In general, theory elaboration is especially suitable for “identifying relations that have not previously been identified, or it may focus on explaining complex relations related to sequential or repeated interactions that have not been fully considered

in prior theory” (Fisher and Aguinis 2017, p. 441). In our case, this means elaborating on the role of ideology in vicarious learning-related communication—an opportunity afforded by the unique ideological heterogeneity present in our sample. Theory elaboration “entails engaging in a process of conceptualizing and executing empirical research. This requires specifying constructs, relations, and processes at the conceptual level and assessing the fit of those relations empirically” (Fisher and Aguinis 2017, p. 441; see also Ketokivi and Choi 2014).

Research Context

Our research context is the Finnish retail sector. We examine how four competing organizations sought ideas and models by sending their members abroad to study, among other subjects, organizations, industries, and technologies in other countries to inform the competitive situation in the domestic market. Empirically, we use travel reports that organizational members wrote to inform others about the observations and thoughts that emerged from their observational activities. The origins of the four retail organizations⁷ stem from an ideological and commercial power struggle between consumers, retailers, and wholesalers. The competitive setting started to emerge in 1904 when a nationwide grocery wholesale organization owned by local cooperative shops, called Suomen Osuuskauppojen Keskuskunta (SOK), was established. By 1910, it had become Finland’s largest grocery wholesaler. By 1915, almost 80% of cooperative shops had joined the SOK collective—later known as the “S Group” (Huumo 2006). The growth generated internal political and ideological tensions. Ultimately, the socialist left wing of the cooperative movement abandoned S Group in 1917 and created its own central organizations, Kulutusosuuskuntien Keskusliitto (KK, Consumer Cooperatives’ Federation) and Osuustukkukauppa (OTK). KK was the ideological sister organization (with some operational responsibilities, such as coordinating the corporate training activities), and OTK was responsible for purchasing, logistics, and, increasingly, the marketing operations of the member cooperatives.

When the two cooperative organizations grew, diversified, and systematized their administrative organizations, they placed competitive pressure on private retailers and wholesalers. After experimenting with several forms of cooperation, two nationwide central organizations emerged during World War II. Established in 1940, Kesko was a purchasing and wholesale organization owned by a private retail collective. In 1942, private wholesalers formed their own purchasing organization, TUKO. After World War II, the four organizations in question channeled more than 90% of the wholesale trade.

The ideological bedrock of the private central organizations (i.e., Kesko and TUKO) was capitalism, and the imprinted purpose of the central organizations was to create value for shareholders. Although it may seem uncontroversial that retailing should be (solely) the business of capitalist, for-profit organizations, in post-WWII Finland, it was far from uncontested. The competing cooperative organizations were driven by the cooperative consumer-activist ideology. The Rochdale principles (e.g., the promotion of education among member-citizens) were among the inspirational texts for both cooperative organizations (Heervä 1976, Lambourne 2008). The difference between the two cooperative central organizations was that the OTK cooperatives had an openly leftist political agenda in which cooperation was an intermediate step toward socialism, whereas the S Group saw consumer cooperation as an end in itself (Suonoja 1966), a counterforce *within* capitalism.

The decades after World War II involved confronting a business logic disruption across four dimensions (see also Ekberg 2012). First, advances in logistics and storage technologies allowed affordable imports of perishable goods (e.g., citrus fruit) and new types of products (e.g., frozen food). Second, information technology and infrastructure development (e.g., roads) made it possible for warehousing to be centrally organized in larger logistics centers. Third, the self-service store replaced the over-the-counter service store. Finally, the central organizations became marketing-driven organizations in which notions of consumer value permeated all organizational activities. Organizations that initially saw themselves as competitors in the factor market and logistic efficiency came to see competition more as a matter of fighting for the consumer's attention, wallet, and loyalty.

All these changes had already occurred elsewhere (cf. Shaw et al. 1998, 2004; Sandgren 2009; Tennent 2013), which makes traveling a particularly interesting phenomenon. Between 1945 and the late 1970s, other methods of knowledge transmission across national borders were still being developed or non-existent (e.g., internet). Thus, travel played a significant role in the vicarious learning of Finnish retail organizations and in the transformation of the entire sector although other means of learning were in use as well. All four organizations, for example, had their own educational units and internal magazines (Seppälä 2018) for large-scale distribution of knowledge. In addition, internal consulting units followed international trends by studying books and magazines and translating texts into Finnish. However, traveling retained its key strategic importance as a method of organizational development and ideological work.

Identification of Sources

Our study is based on a unique sample of travel reports and related documents that all Finnish retail organizations had systematically archived. We collected the data over several years and found rich archival evidence on well over a hundred individual trips from the 1940s to the 1970s with good representation of each organization. Both the general motivations for traveling as well as the formal reporting practices were similar across the organizations. These surface-level similarities of data provide an empirical opportunity to study inter-organizational differences in vicarious learning-related communication practices.

In most cases, the documentation consists of a single travel report or memo with occasionally missing pages or appendixes. In other instances, we had access to multiple travel reports and/or a number of related documents (e.g., presentation materials for internal dissemination of the findings, photographs, and travel reports published in magazines or newspapers). In cases in which a formal travel report was not available, we relied on other available documentation. The trips under investigation included site visits and participation in conferences, exhibitions, and courses; meetings with suppliers and inspections of supplier facilities; analyses of the production conditions of a certain product (e.g., coffee); and combinations of all of these. Some of these travels were explicitly framed as travels intended to generate learning and others implicitly so. We found evidence from the travel reports that learning by observing occurred even in travels that were not designed to produce such information (e.g., procurement-related trips). By contrast, in some cases, travelers documented little learning despite explicitly stated intentions to learn.⁸

To contextualize our findings (cf. Kipping et al. 2014), we are building upon an extensive, ongoing data-collection project on the history of the Finnish retail industry.⁹ We have collected thousands of pages of company documents from company archives to which we have been given full access. We have used this archival material especially in the analysis of learning outcomes and for textual manifestations of ideology in the four organizations. Several retrospective histories of the Finnish retail industry complement these data (e.g., Alanen 1957, Lainema 2009). We also used the obituaries and biographies of former executives and board members as background material. Finally, although we have based our analysis on archival data and published histories, we also interviewed and spoke with 10 individuals who served as executives and managers in the focal organizations over the years.¹⁰ These discussions helped us understand the importance of traveling as a vicarious learning activity and acquire information about the practice

of traveling from an insider's perspective (Gioia et al. 2013).

Data Analysis

Our data analysis represents interpretative (Kipping and Üsdiken 2014) and analytically structured (Rowlinson et al. 2014) historical research with elements borrowed from the qualitative research tradition (Gioia et al. 2013). We started our analysis by looking for differences between the organizations and the changes within the organizations over time as reflected in the travel reports. We studied the histories and inter-organizational differences in ideology, structure, and strategy to identify differences in travel reporting. Additionally, we analyzed the content of the travel reports in terms of the travelers' destinations, organizational positions of the authors, and styles across the four organizations.

Second, we sampled smaller blocks of text (i.e., a sentence or few) from the travel documents and analyzed those data in detail. In total, we collected and analyzed 1,120 passages from 110 individual trips. The passages included specific observations that signaled active agency, such as opinion statements, comparisons, propositions, and valuations about the learning destinations; stated learning outcomes; and decision recommendations. We excluded purely ritualistic elements, such as travel itineraries and participant lists. Also, we aimed to exclude segments of text that were low on information content, such as "the trip to New York from Liverpool lasted three days" or "our main travel destination was England." When long passages contained many observations, we included observations selectively.

Third, we approached this data set with methods used in earlier studies seeking to find repeating patterns in a large mass of textual data (e.g., Mantere and Vaara 2008, Mantere and Ketokivi 2013). We coded the spreadsheet data several times, starting with inductive open coding (Strauss and Corbin 1998). After the number of categories was saturated, we started to combine overlapping categories. We stopped reducing the number of categories after finding six communication practices. Simultaneously with the inductive coding procedure, we followed Gioia and Thomas (1996, p. 377) in an effort to "to gain a general sense of patterns in the data" by reading and discussing the travel reports in an "impressionistic" manner.

We relied on research assistants in the parceling and coding of the observations and propositions. Two research assistants performed the entire coding independently. Relying on outsiders in the parceling and coding helped us resist the temptation to settle on an interpretation of the data too quickly and then selectively attend to the evidence in order to confirm our initial intuitions. This advantage was particularly

important given the large volume of data. The two coding processes resulted in 91% agreement across the entire data set. At the organization-level, the agreement varied between 89% and 92%. In the cases of coding conflict, the two authors made a final judgment, resulting in a clean set of coded observations. At this stage, we decided to pool two categories, resulting in a final list of five communication practices.

Table 1 reports the distribution of these five categories across the four organizations. According to the data, the four organizations are systematically different in their employment of the five communication practices ($\chi^2 = 129.49$; $p < 0.01$). To make sure that the distribution is not an artifact of text parceling, we randomly selected three trips from each organization and closely analyzed the documents from which the passages in the spreadsheet were selected. In our re-analysis, our focus was on the communication practices used in passages that were not included in the spreadsheet. Overall, our findings are qualitatively consistent with the reported quantitative pattern.

Finally, we approached the data with an interpretative mentality in hopes of understanding why the observing individuals employed some communication practices in specific situations while not enacting others. Our analytical approach was microhistorical (Magnússon and Szijártó 2013). This involved analyzing, in detail, specific cases of travel reporting. We situated the reports in their historical contexts (e.g., competitive situation, organizational ideology, structure and strategy, observing individuals' role in the organization), and tried to understand how the contextual factors might have influenced communication practices. We also relied on extensive cross-organization, cross-destination, and cross-report comparisons to facilitate causal reasoning.

Empirical Mystery

Prodevelopment and Procohesion Logic in Vicarious Learning–Related Communication

The data reveals dramatic interorganizational differences in how the observing individuals communicated their observations and ideas based on the travels. The most drastic differences were Kesko and SOK with TUKO and OTK being somewhere in the middle. Consider, for example, these proposals based on Kesko's trip to Sweden:

[Mr.] Jormakka: I propose that we establish 50/50 ownership of retail stores [by the retailer and Kesko]. This [is important] especially when the store is "too profitable", and the proceeds are missed by the central organization. [...] We hope that the central organization supports retailers strongly in establishing and launching new stores.

[Mr. Karttunen]: We have to organize retailer education in a manner similar to SOK [...]¹¹

Table 1. Interorganizational Differences in Vicarious Learning–Related Communication

Communication practice	Illustrative quote	Distribution of communication practices				
		Kesko, %	TUKO, %	SOK, %	OTK, %	Total, %
Challenging	"If we only rely on performance-based pay, we will ultimately end up in trouble. Performance-based pay makes the supervisors lazy" (Kesko, USA, 1974).	6	1	1	2	2
Improving	"The spices were cleaned thoroughly before processing them. We don't have such devices yet, but it is highly important to purchase them" (SOK, Sweden, 1951).	17	14	8	6	12
Making neutral observations	"The department stores have single-story floor plans, and they are equipped with 12 Hugin cash registers. Overall, the department stores resemble Turku's Sokos market, both in terms of operations and appearance" (SOK, Austria, 1973).	60	68	49	57	58
Validating	"We probably didn't learn anything really new about the wholesale stores. Maybe we gained a bit more confidence when we saw that things in our wholesalers are equally well taken care of and maybe even better than in Germany" (TUKO, Germany, 1964).	5	5	2	3	3
Off-tracking	"The schedule was tight. However, all participants were happy, and no one expressed gloominess. I consider this to be a consequence of the physically and psychologically virile group of travelers" (SOK, Sweden and Denmark, ca. 1960s).	11	12	39	31	25
Total, %		100	100	100	100	100
N		222	305	448	145	1,120
Number of travels in the coded data set		22	37	36	15	110

The quote here clearly represents a collective attempt to identify opportunities for organizational development. In contrast, the following quote—obtained from an SOK delegates' travel report from a trip through Europe (in 1956)—displays no attempt in this direction. Instead, the report gets "off track" from the issue of learning to reporting organizationally impertinent observations: "From the church, we headed to St. Leche's cemetery, which is magnificent also as a sightseeing destination. [...] Formidable monuments, weathered by time [...] old man Chopin's grave was full of bouquets [...] people cherished his memory by bringing flowers to the grave all the time, and by taking care of the surroundings of his final resting place."

From the beginning, we were puzzled by such systematic differences in communication practices. The challenge was to understand and conceptualize these differences in a more rigorous way. Our analysis involved the inductive coding of the communication practices employed in the travel reports and extensive interpretative reading of the reports as detailed in the methods section. Based on our analysis, we suggest that the contrast between the selected quotes reflects a difference in the logic of communication between Kesko and SOK. In the former, the communication reflects a prodevelopment logic, and in the latter communication, practices reflect a procohesion logic.

The underlying principle in prodevelopment communication is the production and dissemination of ideas that intentionally aim to stimulate organizational improvement. In contrast, procohesion communication aims to maintain social structures and positions, sometimes at the cost of organizational development goals. The tone of procohesion communication is often light, even humorous, and avoids topics that might generate conflict in an organization or question its ideological principles.

All of the travel reports across the four organizations employ the practice of *making neutral observations*, which refers to describing observations from an "objective" viewpoint without stating or implying normative judgments. Similarly, the observing individuals of all organizations engaged in *validating*, which entails reaffirming the validity of the organization's existing ideology, structure, or strategy. Beyond these similarities, prodevelopment and procohesion communication are associated with different communication practices. The former is reflected in the use of two practices, in particular: challenging and improving. *Challenging* entails openly calling into question the organizational status quo. One way of challenging involves highlighting the differences between the observing organization and the observed organization and then using these differences to articulate a need for large-scale organizational change.

The practice called *improving* involves making decision recommendations that amount to incremental improvements (including suggestions to explore an issue further). Even if the normative implications are not explicit, we consider an observation challenging or improving if the normative implication can be clearly inferred from the context (e.g., the purpose of the trip, travel report taken as a whole). By contrast, procohesion communication involves keeping a neutral tone with regard to organizational development issues. Although containing little challenging or improving, procohesion communication involves *off-tracking*, which refers to the practice of getting off track, intentionally or unintentionally, by reporting trivial observations, joking, or making other organizationally impertinent remarks. Although, in prodevelopment communication, making neutral observations and validating are used to support improving and challenging, they have no such rhetorical function in procohesion communication. Table 2 summarizes the two logics and their associated communication practices.

Prodevelopment communication was relatively scarce (see Table 1). Given the conditions of the travels, one might expect to see a great deal of challenging in the travel reports. The distance provided through travel and the rich informational inputs provided by observing other (more advanced) contexts could be expected to easily lead to the recognition of ideas that challenge organizational members' fundamental beliefs about how their organizations should be structured and how they should operate. Such ideas certainly existed given the relative backwardness of Finland at the time. Setting aside implementation difficulties, one might expect the travelers to at least suggest departures from the status quo as Olavi Salonen, OTK's head of the mill division, did in 1954:¹²

"As a general remark, from Austria, I recognized that all co-operatives shared the same Konsum brand name. In Finland, we do not have this advantage. The use of the Elanto brand name would be the equivalent solution in Finland."

In contrast, it is easy to identify procohesion communication in the travel reports, in which, instead of organizational implications drawn from observations, one finds travelers reporting on organizationally impertinent issues. A traveler might report that "the stores [in Nassjö] offered us an opportunity to rid ourselves of excess Swedish money" but fail to put forward any concrete recommendations on how their own organization might be improved based on what the traveler observed before or after going on a shopping spree. To explain this pattern, we focus on the substantial interorganizational heterogeneity in communication practices.

Alternative Explanations

In the subsequent section, we show why ideology is a potential explanation for interorganizational differences in communication practices. However, we first explore a number of alternative, theoretically plausible explanations (inspired by Mahoney 1999, Jacobides 2007).¹³ First, we might reason that the observed differences in learning-related communication are the results of interorganizational heterogeneity in strategy. This lens would fit large segments of normatively oriented strategy literature (e.g., Porter 1996, Grant 2003), implying a strong link between intended goals and actions. Historical analysis indeed highlights dramatic differences in terms of strategies. After the Second World War, the most important strategic differences among the four organizations related to their foci along the retail value chain. The cooperative organizations remained faithful to their initial

Table 2. Prodevelopment and Procommunication Logics and Their Associated Practices

Communication practice	Description	Associated logic and theoretically related concepts
Challenging	Openly calling into question the organizational status quo	Prodevelopment communication: championing (Floyd and Wooldridge 1997), divergent and convergent strategic behavior (Tarakci et al. 2018), pro-organizational suggestions (Detert and Edmundson 2011)
Improving	Making recommendations that amount to incremental organizational improvements or suggestions to investigate an issue further	
Making neutral observations	Describing observations from an "objective" viewpoint without clear normative judgments	Making neutral observations and validating are observed in the context of both prodevelopment and procohesion communication and should be interpreted as part of the accompanying communication practices.
Validating	Reaffirming the validity of the organization's existing ideology, structure, or strategy	Procohesion communication: strategic ambiguity (Abdallah and Langley 2014), self-censorship (Williams 2002), sugarcoating (Fang et al. 2014), information misrepresentation (Schilling and Fang 2014)
Off-tracking	Reporting trivial observations or making other organizationally impertinent remarks	

strategies of eliminating profit-seeking intermediaries in the value chain through vertical integration (intendedly for the benefit of the member consumers). They both heavily invested in manufacturing (e.g., specialty goods manufacturing). The private organizations initially followed the cooperatives' vertical integration strategy, but they subsequently divested their manufacturing operations and concentrated on maximizing the competitiveness of their wholesale and retail operations. TUKO focused on the owner-wholesalers' purchasing, warehousing, and logistical operations, whereas Kesko paid increasing attention to its owner-retailers' marketing activities. Over time, Kesko transformed itself into a retail chain operator with a franchising-type business model (though without ever using the term "franchising"). The other three central organizations eventually evolved toward a similar retail chain operator business model in the grocery trade. Differences in strategy are manifested in the *content* of the travel reports we studied. Typically, TUKO's managers traveled and aimed to enhance understanding of issues pertaining to wholesale operations (e.g., procurement, logistics), and representatives of Kesko were primarily interested in retail management issues (e.g., store portfolio management, store layouts, advertising). The cooperatives, following their strategy of diversification, sent their members to acquire information on various industrial operations besides trying to learn about issues related to retailing and wholesaling while also using the travels for international networking among cooperative organizations (for an example of the breadth of information acquired, see the discussion of Salonen and Aro's trip to the United States in 1961). Accordingly, the perspective of strategy and business models allows us to explain *what* differences travelers observed and communicated, yet this does not help in explaining the overall difference along the prodevelopment versus procohesion dimension (cf. Ocasio et al. 2018).

Second, one possibility is that the prevalence of procohesion communication in the cooperative organizations reflects complacency stemming from good prior performance (e.g., Denrell and March 2001). The problem with complacency as an explanation is that all four companies did fairly well financially until the 1970s. This was partly because of the extended wartime price regulation, but the market also grew rapidly. One could still argue that, in relative terms, the cooperative organizations were more complacent because of their past performance (after all, SOK was the country's largest grocery wholesaler). Although this could, in part, explain SOK's procohesion communication, we should symmetrically expect Kesko to move toward procohesion communication in the 1960s or in the 1970s at the latest when Kesko and the K retailers were rapidly approaching the position

of a market leader in grocery retailing. This does not happen, showing that the explanation is partial at best.

A third line of reasoning suggests that top management teams of the four organizations held outdated cognitive frames and were, thus, hostile to new ideas (Tripsas and Gavetti 2000), resulting in the avoidance of prodevelopment communication (Detert and Edmondson 2011, Vuori and Huy 2016). Self-censorship (Williams 2002) certainly explains some part of the limited amount of prodevelopment communication. Across the four organizations, prodevelopment communication was generally limited to topics that were expected, by the observing individuals, to be well received within the organization. Recommendations that would counter the organization's established strategic direction could come with a social cost, real or perceived (e.g., Detert and Edmondson 2011, Vuori and Huy 2016). At minimum, dramatic suggestions would most likely lead nowhere (as was the case with Mr. Salonen's recommendations). This is reflected in the observation that the topics of prodevelopment communication varied between the studied organizations according to their strategic foci. Kesko's prodevelopment communication pertained frequently to strengthening the retail support operations (e.g., store portfolio management, store concepts); the prodevelopment communication pertaining to TUKO was usually associated with purchasing and logistics (e.g., frozen and canned food); SOK's and OTK's travelers' prodevelopment communication often typically related to various manufacturing operations (e.g., manufacturing technology). However, this view again fails to account for the interorganizational differences in the overall amount of prodevelopment communication.

Finally, the concept of ideology overlaps with concepts such as organizational culture and institutional logics (e.g., Weiss and Miller 1987). Therefore, we cannot rule out these explanations in the same way we do with the preceding explanations. Of these three, ideology is theoretically the most appropriate because of its best correspondence with the emic description of interorganizational differences. All four organizations perceived themselves to be in an ideological competition with each other (i.e., Kesko/TUKO versus cooperatives and, to a lesser extent, SOK versus OTK) besides competing in "purely" market-based, economic terms. The ideological differences between the organizations were probably reflected in the respective organizational cultures, but it is impossible to distinguish between the two empirically. Likewise, we could reconceptualize ideology in institutional logic terms, but doing so would unnecessarily distance the empirical analysis from the way in which the *in situ* actors spoke of and talked about the matters. Moreover,

international comparative studies show that cooperatives are relatively similar across different institutional systems (Hilson et. al. 2017a), which hints at the existence of an ideological core rather than organization-specific cultures and institutional logics that just happen to be similar in different countries.

The Structural and Ideological Contexts of Travelers: Organization-Level Analysis

Our key finding concerns how ideology influences communication practices. According to the historical evidence, ideology produces its impact through two mechanisms: First, ideology affects vicarious learning-related communication as an internalized model. The subjective urge to engage in prodevelopment communication and the collective expectation of such behavior are differentially prevalent across ideologies. Second, ideology shapes vicarious learning-related communication indirectly through organizational structures. In line with earlier literature emphasizing the effect of organizational design on organizational learning (e.g., Cohen and Levinthal 1990, Ocasio 1997, Schilling and Fang 2014, Ocasio et al. 2018), our findings suggest that a structural context, in which there is a small likelihood that prodevelopment communication materializes in concrete organizational changes, discourages such communication—especially the more radical variety. We elaborate and illustrate our argument as follows.

Kesko: A Learning Organization

Kesko's travel reports do not surprise present-day students of organizational learning and adaptation. It is clear from reading the reports that much of the reporting was premised on the notion that the individual's observation could serve as a relatively direct springboard to organizational development. Frequent use of prodevelopment communication practices was encouraged by a structural context that cued the observing individual that change was possible based on what was suggested. Kesko had a reasonably effective system for disseminating the lessons from abroad across a network of regional offices and retail outlets. This system had several elements. First, Kesko headquarters regularly interacted with regional offices' managers both on an ad hoc basis as well as in periodic meetings among all regional office heads. Second, managers of regional offices as well as "leading" retailers could also be invited on a follow-up trip to see for themselves the value of the changes being promoted. Third, Kesko had an internal consulting unit that "studied and developed procedures and collected experiences from different practices, distributed experiences and ideas across the retailer network, and proposed courses and training to meet

the demands of daily business" (operational plan of Kesko's internal consulting unit, 1964). Finally, new practices could be disseminated across the organizational network through Kesko's retailer education unit (Seppälä 2018).

The system worked in practice as well. Many of the innovations with which Kesko was a pioneer were discovered and/or refined on the basis of observational learning abroad and disseminated through this system. These included routines and policies related to store portfolio management (adopted from Sweden), store concepts (Switzerland), and a franchising-type rental policy that tied rent to store turnover and subsequently to operating margins (the United States).¹⁴ Kesko and the K Group (the name for the retailers and Kesko together) were also the most effective in switching to self-service stores, beginning in the late 1950s. These innovations resulted in significant competitive advantages for Kesko: the group rapidly gained market share from competitors during the observation period.

Expectations regarding appropriate communication practices also stemmed from the broader web of travel-based learning practices of which reporting was a part. One gets a sense of these practices from the travel reports themselves. The documents depict travel planning as a highly systematic activity and show that knowledge sharing was explicitly seen as an important element in the learning process. Accordingly, the role of the individual as part of the larger system of vicarious learning was to inform the broader collective of individuals to act as the "eyes and ears" of the organization. A travel report from the United States (in 1974) illustrates the methodological and calculative nature (Kalberg 1980) of travel-based learning: "The trip was carefully planned and prepared. E.g., one participant had already visited the destinations on our route. Reports from the destinations had been delivered to us beforehand for independent study. Furthermore, there was a training day before the trip. Each day during the trip was followed by an evening brief, where we talked about what we had learned that day."

The excerpt illustrates the meticulous approach to the travels of learning. Trips were often carefully planned and scheduled, executives and managers selected a limited number of managers and retailers eligible to travel, and learning activities included systematic knowledge sharing and processing.

To understand the extensive use of prodevelopment communication and the broader web of practices associated with (travels of) learning, it is essential to note that Kesko was a pure capitalist organization throughout the study period. The value of Kesko—of any organization for that matter—was hierarchically determined by the needs of shareholders (i.e., retailers)

and customers. Individuals, in turn, are instruments of the organization (cf. Marx and Engels 2010, orig. 1848). Writings testifying to this instrumental view of organizations and individuals abound in Kesko's archival material. For example, the capitalist ideology was invoked in the organization in the face of technological change to reframe uncertainty as a positive phenomenon as the following comment illustrates: "We must be able to adopt those technical innovations which our technocrats [meaning especially the internal consulting unit and IT department] have filtered and studied before offering for our use. While our new giant computers may feel like the beast from the Apocalypse...we must courageously recognize the opportunities these machines offer" (speech by Heikki Nuutinen, 1970, Kesko).

The quote illustrates the forward-looking ethos of Kesko's managers. The message to managers and staff working in the central organization was to look for efficiency benefits and increasing competitiveness. Also in line with capitalism, internal competition among retailers was often discussed in a positive manner. Kesko's executives spoke of "natural selection" when referring to "good and bad" retailers. Thus, competition and progress were intimately interlinked: "The power of competition [...] is its forward-looking, creative, and dynamic nature in contrast to the inert and static. If this were not the case, our free [capitalistic] society in which we believe would have disappeared and some other political form would take over" (Kehittyvä Kauppa 1963).

Competition and evolutionary ideas, such as the "survival of the fittest" were of crucial importance in the ideological discourse supporting and defending capitalist and entrepreneurial values as counter-force toward socialism and cooperativism. Kesko's commitment to capitalism is also reflected in, for example, the special importance of the U.S. business culture and its idolizing in the ideological discourse of Kesko: "The attitude of Americans to organizing their daily affairs seems in a way more rational, unbiased, and full of continuous search for new solutions rather than constantly relying on old ones [...] To some extent, personal enterprise reflects our dreams: the taxi driver's dream of a taxi company, the doorman's dream of a hotel, and the bartender's dream of a restaurant of one's own. The Kesko and K-store staff have the opportunity to start their own business as K-retailers—isn't this a resource that we should utilize more?" (travel report, the United States, 1974).

Although Kesko's commitment to capitalism is shared by most organizations of today, capitalism was not a taken-for-granted feature of the society during our observation period. This explains why capitalism is explicitly discussed in the sources. Although the preceding quote does not look dramatic

for contemporary eyes, the capitalist ideas of entrepreneurship and free market competition discussed in the quote were competing against leftist ideas of the time.¹⁵

In the context of a capitalist organization, the task of the individual is to help the organization; hence, the prodevelopment communication in the travel reports. In so doing, individuals might, of course, prove their worth to the larger system and, thus, rise in the corporate ranks. Capitalist ideology does not work through incentive systems and coercive power alone—that is, through what Foucault calls "negative power" (e.g., Foucault 1980, p. 142)—but also through an internalized model of the "spirit of capitalism" (e.g., Chiapello and Fairclough 2002). A subject of capitalism is devoted to advancing organizational goals "as an end in itself" as Weber (2005, p. 23) states. Prodevelopment communication comes naturally to an individual who has internalized the capitalist ethos.

TUKO: Structurally Encumbered Capitalism

In theory, TUKO should have resembled Kesko in many ways. The two companies had a shared history as the balancing force against the cooperative organizations and they both shielded an openly capitalist ideology. TUKO's stated purpose was to ensure the competitiveness of its affiliated group of organizations (primarily wholesalers and secondarily retailers).¹⁶ TUKO and its top executives were also politically active and supported financially the moderately right-wing National Coalition Party. The ideological context would have invited prodevelopment communication, yet TUKO's structural context neutralized the positive effect of capitalism. Prodevelopment communication was scarcer and more conservative than in Kesko except in the context of a relatively narrow scope of issues. Especially at the beginning of the study period, TUKO lacked a system for implementing the potential insights gained through observational activities. The main reason for this was that, although Kesko had regional offices under its hierarchical control, the regional wholesale operators related to TUKO were legally independent from the central organization. A long-time executive in TUKO describes the power structure between "T wholesalers" and TUKO as follows: "Despite the name of 'central organization' [denoting some degree of hierarchical control], TUKO was a servant organization of its shareholders, which had a weak ability to influence the decisions concerning the structure of the retail group" (Alhava 2016, p. 72).

The quote illustrates a more general tendency among TUKO executives to see themselves as powerless against the will of the wholesale owners, many of whom were reluctant to change even when

experiencing financial difficulties. To some extent, TUKO's executives had internalized their position as components in the larger administrative system working on behalf of the owners. Although most individuals understood that wholesale companies' behavior was suboptimal for the whole group, there was no effective resistance against their actions. Accordingly, save for improvements concerning purchasing and some aspects of the logistics operations of the group, TUKO and its managers could not directly change any aspect of the functioning of the retail group as a whole without engaging in a lengthy negotiation process with the owner-wholesalers. From the observing individual's point of view, this meant that most recommendations would not lead to any concrete changes in the organization. Accordingly, challenging was scarce. The exceptions related mainly to manufacturing, purchasing, and some aspects of logistics—in line with where TUKO had more power within the group. For example, a report from a trip to Sweden and Denmark (in 1956) describes TUKO's opportunities in the frozen food market (an area in which TUKO did have autonomy) as follows: "Quick-freeze products could be a viable market in Finland. Fresh fish cannot be acquired throughout the country and, in general, the fish trade is seasonal and low in terms of volume. [...] All frozen products should be branded. Besides paid advertising, we should pay attention to societies close to consumers and housewives in particular."

Frozen products and other logistical developments were typical topics in TUKO's reporting and, more generally, strategic development. These topics were politically neutral—they did not invoke hostile reactions from the wholesale owners—and made it possible to catalyze changes and modernization in some aspects of business. The narrowness of topics among which prodevelopment communication practices were used is reflected in learning outcomes as well. We are not aware of any innovations that TUKO would have imported from abroad before competitors. The case of frozen food could be one of the exceptions to this rule, but even in that field, competitors were relatively fast in the adoption of the new product segment.

Challenging the status quo would not have led to dramatic negative personal consequences for the observing individuals, frustration and experiences of not being heard notwithstanding (cf. Vuori and Huy 2016). As our data demonstrate, these were enough to silence most. We suspect that the travelers had an intuitive understanding of what was possible and instinctively adjusted their communication accordingly. This is impossible to prove, but circumstantial evidence supports the proposition. One exception to the overall pattern of observing individuals'

communication practices is Matti Mare's trip to the United States in 1979. Mare had previously made similar trips with Hemköp, a Swedish entrepreneurial retail company. Accordingly, he had a model for how an organization could directly implement observations and ideas in its daily practices. In 1979, Mare tried a similar approach by (a) writing a long, fairly critical travel report to TUKO executives and (b) providing an illustrated booklet for large-scale distribution among retailers and shopkeepers. We do not have evidence of how and to what extent the booklet changed practices at the shop level. However, according to Mare's retrospective oral account, the response among other executives and members of the board was "positive but lazy." Mare started his own real estate business soon after the trip. It seems likely that most observing individuals anticipated the positive but lazy reaction and chose to tone down their communication accordingly. Overall, TUKO is an example of an organization in which structural factors neutralized the potential of the forward-looking capitalist ethos to foster the use of prodevelopment communication practices.

SOK: A Champion in Individual Learning

Structural factors can only partially explain the extensive use of procohesion communication practices in SOK. The corporation had some elements of Kesko's system for implementing the ideas that emerged through travel. These included nationwide regional office networks as well as corporate training facilities for educating store operators (Herranen 2004). SOK's system for disseminating new knowledge was more complex and probably not as effective as Kesko's was. One additional layer of complexity came from the fact that SOK had an ideological sister organization, YOL, which was responsible for internal consulting, whereas Kesko's consulting organization was under the direct control of the headquarters. The point remains that the observing individuals could, in principle, see a way in which their observations would translate into change in SOK and its respective group of member cooperatives. Consequently, the ideological core of SOK emerges as the strongest explanation for how the observing individuals communicated their travels of learning.

The ideological reason for establishing SOK in 1904 was to fight for the democratic distribution of power and wealth in Finnish society. This mission was derived directly from the ideologies of the member cooperatives. The strong economic dimension of the organizational ideology was reflected in the organizational parlance that described the S Group as "impartialists." On the surface, the collective had no political agenda besides balancing the scales of power between private retailers and consumers. In reality,

SOK was influenced by the ideological premises of the consumer cooperative movement. For example, in accordance with the Rochdale principles emphasizing education, SOK's travel seems to have been driven by the motivation to educate individuals rather than improve the organization in stark contrast to the rationale for traveling within Kesko. When viewed as a means of education, the travels can be seen as a means of socializing individuals in cooperativism and training them to become productive cooperative members rather than as a means of *organizational* development. As explained in *Osuuskauppalehti*, a personnel magazine published by SOK: "The success of (consumer) co-operative efforts is based on sufficient level of education of its champions. Cooperation, you see, requires that individual effort is aligned with collective interests. [...] Therefore co-operative activity is at its core [...] a matter of education."¹⁷

In this ideological context, there is little need for communication practices that emphasize the direct organizational utility of traveling in terms of learning. What is important is that the *individual* learns or, more specifically, is being educated about the cooperative ideology and that the individual acquires knowledge and skills relevant to helping the cooperative succeed and grow. Thus, ideology potentially explains why it is difficult to identify operationally relevant observations or practicable strategic insights in SOK's travel reports. In contrast, it is easy to identify a pattern in which traveling was important for the individual traveler. One typical example of such a trip was a two-week tour in 1951 through most of Western Europe by an "advertisement artist" (now known as an art director). The traveler stated that he "walked hours and hours looking at store decorations and street lights, enjoying the sights as good theater" and that "seeing posters against the scenery of the Swiss countryside was a unique experience." The example is revealing because most travels (except buying trips) share the same, almost ritualistic approach to the travels of learning, emphasizing the experiences of the individuals rather than the utility from an organizational standpoint.

The ways in which the travels were funded also underscored the importance of individual learning in the cooperative ideology. The cooperative organizations allocated travel funds as "grants" or "stipends" given to organizational members instead of as strategic "investments" by the organization. Although the latter form of spending is legitimate only when it results in something valuable for the organization (e.g., operationally relevant observations or policy recommendations), the former type of spending does not have such requirements. This different conceptualization of travel funding signaled the priority of individual-level development over and above

the organization. The importance of educating individuals to the cooperative movement is also frequently discussed outside the travel reports. For example, a magazine published by SOK proclaimed the following in 1968: "SOK aims to facilitate and strengthen the economic wellbeing of its members. Yet our association has higher aims as well: to catalyze cooperation among citizens from different social backgrounds and to improve economic wellbeing and the educational level of all these social groups" (*Osuuskauppalehti*, 1968).

The quote reflects a basic tension between ideology and market competition. On the one hand, SOK was not isolated from the market and institutional pressure coming from Kesko and societal expectations of profitability and efficiency. On the other hand, organizational texts largely repelled these pressures and emphasized the mission of developing individuals toward good citizenship. Education was necessary for the mission, but as far as we can tell, the organizational benefits were expected to be indirect at best, manifested through individual growth and learning.

Although the results of traveling were perhaps great at the individual level, they were rather weak at the organizational level. One example of this is the development of the S Group's store network. After WWII, rapid economic growth and urbanization caused the average store size to increase and the demand to shift from rural areas to cities. Importantly, similar developments occurred some years ahead of Finland in Sweden. SOK used traveling to learn about the Swedish developments, yet responded to the trend rather slowly, at least compared with Kesko. The following quote illustrates how travelers bypassed the difficult observations and off-tracked instead (practically throughout the long report): "After a night spent together [with the wives], the ladies went again their own way as the men stayed in the hotel to listen and talk about the results of cooperative organizations and store network development in Södertälje and all of Sweden [...] There was a sightseeing tour in the women's program" (SOK, 1960s).

At the time, it was general knowledge in the Finnish retail industry that the Swedish economy and retail industry had already gone through changes (e.g., urbanization, emergence of self-service stores) that were likely to happen in Finland, too. A logical assumption would be that travel reports from this crucial period would have focused on these strategic challenges. After all, they were discussed during the trip as the report documents. Instead, the travel report is almost completely void of these "strategic issues" (as they would be viewed today). The travelers must have understood the magnitude of the forthcoming change, yet they chose not to share their related observations.

Ideology played a major part in the tendency to avoid communication that challenged the status quo. SOK's ideological bedrock was consumer cooperation embedded in an agrarian society. When urbanization started in the 1950s and continued in the 1960s, SOK faced a situation in which assumptions of a typical cooperative member started to erode. This erosion, however, took time in terms of both practical changes in business management and the ideological discourse.

The excerpt is, thus, a good example of the communication getting off track from an organizationally pertinent issue to something that is not relevant for the organization. Although the concerned individuals probably learned a lot through the discussions, the use of off-tracking hindered, in this case, the information becoming *organizationally* processed. Curiously, the CEO of SOK stated almost in parallel in 1969 that “we have an almost optimal composition of grocery outlets” (*Osuuskauppalehti*, 1969), which, in retrospect, we know was not true. We claim no direct causality between these two quotes, but they do serve to illustrate the logic in which procohesion communication hindered the transfer of individual learning to the organizational level.

In sum, though the ideology of cooperativism provided a sense of purpose for the organizational members, it seemed to hinder the use of traveling for organizational learning purposes. The profit seeking of capitalist organizations was seen as morally inferior because cooperativism was founded upon “higher aims.” Included in these was the individual development of organizational members. The operational development of the organization was *not* a priority, resulting in limited prodevelopment communication and plenty of procohesion communication.

OTK: Socialism Within Capitalism

Although individual learning was ideologically important in OTK as it was in SOK, it is clear from reading the reports that organizational learning was a much more salient goal of traveling in the former. Many of the travel reports were focused on factual description of the observational targets from the point of view of OTK. To illustrate, a report from a trip to Sweden, Norway, and Denmark in 1949 reports the following: “The fish retailing market in Stockholm is organized so that Konsum is involved in it through the aforementioned subsidiary, Kronlaxen, not directly.” Although OTK's travel reports quantitatively follow a similar communication practice pattern as SOK (Table 1), our qualitative impression is that OTK's travel reports are more prodevelopment oriented than SOK's. In this way, OTK reflects some similarities with Kesko and especially TUKO. At the same time, Kesko's observing individuals challenged

the organization more openly and actively than did those from OTK. To understand this pattern, it is important to focus on the collectivist values associated with socialism in conjunction with the ideological commitment to democratic corporate government, rooted in both the cooperative ideology (e.g., Rochdale principles in sections 6–7) as well as the ideals of socialism.¹⁸

The collectivist spirit of socialism, involving the moral obligation of individuals to work for the benefit of collective goals, is reflected in OTK's travelers' use of prodevelopment communication practices. Such communication signals the role of the individual as being in the service of a greater cause, and in OTK's case, it meant an effort to democratize the economy and promote “equality among its members on the basis of collective responsibility.”¹⁹ Organizational members were employed in an ideological mission—serving the socialist cause—not only as salaried workers or professional managers. Indeed, employees and representatives of the governing bodies of OTK were often associated with various left-wing movements and organizations. Ideology could also be leveraged to facilitate organizational change, making it reasonable for the observing individual to engage in prodevelopment communication. As the leftist cooperative movement viewed itself as part of the larger labor movement (in SOK, consumer cooperation was an end in itself), potential conflicts associated with organizational change could be bridged (Kaplan 2008) using the broader, labor-movement frame.

It is understandable why, in this ideological context, travelers focus in their communication on making organizationally pertinent observations (i.e., making neutral observations) and suggesting ways to improve the organization (i.e., improving). However, ideology also explains why the suggestions were largely incremental, that is, why challenging observations were infrequent relative to Kesko. With socialism and the cooperative ideology came the idea that decision making should be democratic rather than based on control of shares (as in a capitalist organization). Characteristically, in the late 1960s, OTK's top management defined the organization as a “democratic society” (board of directors meeting, 1968). Moreover, the governance system that provided OTK's management with its guidelines reflected these democratic principles. Leftist political parties and labor unions had considerable power over the organization's administration and strategic decision making.

In this context, the observing individual could expect to witness considerable political resistance if any major departure from the status quo were to be suggested. The prospects of achieving nothing by “challenging” was similarly bleak as in TUKO (although in TUKO this was the result of the legal

independence of the wholesalers rather than ideology). To minimize the individual's standing in the organization as well as the emotional costs (e.g., anxiety, frustration), it made sense for the observing individuals to refrain from challenging the status quo. Evidence (admittedly suggestive rather than conclusive) of individuals "staying in their place" in the context of travel-related communication is provided by the travel reports of Olavi Salonen, a long-time employee of the company. Between 1950 and 1970, Salonen worked in industrial production, retailing, and ultimately as an executive at the corporate level. When he was working in manufacturing, the improvements that he suggested focused on issues that were pertinent to those activities.²⁰ As the head of the mill division, he reported the following from the Anuga fair: "The best packaging machine for OTK is PDKB. The price is 174,000 Deutschemarks. Delivery in 22 months." Later, reporting as a soon-to-be executive board member at OTK with Emil Aro (a soon-to-retire executive board member),²¹ Salonen wrote with a notably broader focus. The 26-page report from a trip to the United States (in 1961) describes a visit to cookie factories (one in Denmark), a feed plant, some cooperative retail organizations (including the United Co-Operative Society of Fitchburg, which was founded by Finnish immigrants), a bread factory, a coffee roastery, a sausage factory, and a warehouse center. The range of destinations and the diverse observations serve to demonstrate the impact of Salonen's new, higher standing in the organization.

OTK was unable to implement major changes learned from abroad that would have provided the central organization or the member cooperatives with major competitive advantages. As an exception—and we have to move slightly outside our study period here—in the early 1980s, OTK was the first organization in the Finnish context to establish a nationwide retail organization with integrated wholesale and retail functions. This was accomplished by all member cooperatives merging with OTK. The other three were various

hybrid forms. The mega-merger and its associated structural reforms could be considered a pioneering organizational innovation in the Finnish context. The model for this was justified based on observations from Denmark and Austria.²² Otherwise, the lack of major competitive advantages is well mirrored in the absence of challenging in the travel reports. The precise causal relationship between the two is obviously complicated. Even if challenging would have occurred more often in the observing individuals' travel-related communication, the organizational learning outcomes could have well been the same given the politically charged, democratic form of corporate governance.

Discussion and Conclusions

We have studied vicarious learning-related communication practices in an effort to understand why organizations differ in how their members communicate their observational activities to others. Our empirical analysis identifies two distinct logics of communication: prodevelopment (communication in order to induce positive organizational change) and prococohesion (maintaining unity within the organization). The default mode of communication behavior, assumed tacitly by most learning scholars, is the former. This assumption seems particularly reasonable in our context given the high cost and also the high learning potential of study trips to more advanced countries at the time. Following leads from earlier studies on vicarious learning, prodevelopment communication can be obstructed by poor organizational design, misaligned incentives, toxic organizational culture, failures in recruiting, and, subsequently, in individual and organizational capabilities. Our study extends these viewpoints by highlighting the impact of ideology on vicarious learning communication and, potentially, learning outcomes. The empirical evidence (summarized in Table 3) indicates that the ideological differences across the organizations were reflected in heterogeneous communication practices

Table 3. Summary of Empirical Evidence

Organization	Ideology	Primary logic of communication	Pioneering innovations adopted from abroad
Kesko	Capitalism	Prodevelopment communication	Extensive adoption of self-service stores, centralized store portfolio management, and development of "store concepts" thinking
TUKO	Capitalism	Prodevelopment communication (conservative)	None to our knowledge
SOK	Consumer cooperativism	Prococohesion communication	None to our knowledge
OTK	Mix of socialism and consumer cooperativism	Mix of (conservative) prodevelopment and prococohesion communication	Organizational design that integrated wholesale and retail functions in one nationwide organization

and—perhaps, in part, because of this—also in the learning outcomes.

Our historical approach and the ideologically heterogeneous sample of firms affords the proposition that prodevelopment communication may be somewhat specific to contemporary, capitalist firms (Ingram and Simons 2000). Other ideologies, in particular, consumer cooperativism, may foster procohesion communication, which strengthens social cohesion and affirms the superiority of their ideological beliefs instead of catalyzing organizational learning from observations. To present-day subjects of capitalism, the prevalence of procohesion communication as recorded in our data may seem strange. The strangeness of social practices, however, is history specific. For us, Kesko (a firm with the clearest pattern of prodevelopment communication) represented the normal case, and SOK's (procohesion) behavior was the mystery to be explained. However, a scholar from the 18th century would consider Kesko the anomaly and SOK the normal case. The incessant pursuit of greater organizational efficiency and effectiveness—by means of vicarious learning or otherwise—found in today's capitalist organizations might seem like the “product of a perverse instinct” (Weber 2005, p. 33) to a person from a precapitalistic era.

SOK and OTK were affiliated with ideologies that emphasized social development at individual and societal levels. In this ideological logic, organizations were tools for achieving these goals, whereas in the openly capitalist Kesko, the competitiveness of the organization was an end in itself. Accordingly, individuals working in Kesko evidently knew their role in looking for efficiency and new ideas, whereas for individuals working in SOK and OTK, role expectations were more ambiguous, resulting in ambivalence in travel reporting as well.

Although individuals must have recognized the superiority of Kesko's efficiency in the imitation of the best international examples, it took decades before the cooperative organizations started to abandon their ideological premises. That indicates the depth of the ideological impact. Cooperatives, for example, hired from the same business schools and universities as Kesko and observed the same or similar international models, yet their communication practices did not change until performance problems in the 1970s became so severe that a fear of takeover by banks catalyzed radical changes in both cooperatives. Although this change process is outside the scope of this study, the cooperatives became increasingly assimilated with the capitalist ideology, similarly to what has happened to kibbutzim (Simons and Ingram 2000).

Our study contributes to management and organization theory in three ways. First, we underscore the ideological dimension of vicarious learning-related

communication and the consequent possibility that ideology impacts what organizations learn by observation. In general, vicarious learning is understood to be an important mechanism by which organizations change and survive (DiMaggio and Powell 1983, March and Simon 1993). Our work reveals that existing academic work on organizational communication as it pertains to vicarious learning is mostly expressive of a market capitalist ideology without usually saying so. This ideological bedrock of vicarious learning tends to go unnoticed because firms in an industry, for example, tend to have very similar underlying ideologies. Although capitalism can be attacked from a political angle, ideology's impact is also important to recognize from a purportedly positive point of view. If and when capitalism is increasingly challenged as the ideological basis of management and organization (e.g., Phan et al. 2016, Parker 2018), the alternatives will carry with them a new set of ideological premises with potentially important consequences for vicarious learning. One of the interesting questions is whether the new ideologies support organizational learning in ways in which the affiliated firms can outcompete capitalist organizations.

Second, our study indicates that organizational members may preemptively modify their communication in light of the bleak prospects of generating organizational change. Prodevelopment communication can be scarce and conservative, not necessarily because there is a considerable risk of direct negative consequences for the observing individuals—as much of the existing literature assumes (e.g., Detert and Edmondson 2011, Vuori and Huy 2016)—but because it simply seems rather pointless. We suggest that, if change is unlikely, so is prodevelopment communication. Observing individuals have a capacity to think about implementation before they say anything, and this is likely to impact what they say and how they say it. This adds yet another layer of complexity to the process of imitating other organizations (Bresman 2013), making it more understandable why organizations differ in strategically significant ways (Jacobides and Winter 2012).

Third, we contribute to the literature on the impact of (political) ideologies on organizations. Like others before us (e.g., Ingram and Simons 2000), we show that ideologies can have important effects in organizations at the level of microlevel organizational practices. Because ideology is historical, one can better understand how and why organizations behave by understanding norms of efficiency and rationality as historically constrained. Accordingly, we may treat history as a source of data (which it is) and also as a way to identify how seemingly immutable behavioral laws governing organizational behaviors are, in fact, specific to historically developed

conditions (cf. Cattani et al. 2013). Overall, earlier research on the impact of ideology on innovation and organizational behavior (Tsoukas 1994, Hodgson 2002) has given reasons to assume that, especially, socialism changes the ways organizations learn and engage in innovation practices. Our study is one of the first attempts to identify and theorize the microlevel practices and processes involved and explain why political ideologies result in varying learning-related practices.

Our research has several limitations warranting more research. First, our choice of ideologies to consider was the function of empirical opportunity. Although capitalism versus cooperativism as well as capitalism versus socialism debates remain relevant today, other ideologies (see, e.g., the hacker ethic discussed in Himanen 2002) are also likely to have important consequences on communication practices and consequently shape how the affiliated organizations learn, adapt, and survive. Second, we have painted ideology with a rather broad brush. Instead of treating capitalism or socialism as singular ideologies, future research could investigate its variants, such as libertarian capitalism, welfare-state capitalism, and conscious capitalism, as the ideological foundation of vicarious learning (cf. Park et al. 2020) and organizational practices more generally. It would be also interesting to study political ideologies within capitalism and their effects on organizational learning. Finally, the link from ideology to learning is a complex one, difficult to prove or disprove in any single study. For example, when organizational learning is understood in terms of change in organizational practices, it is evident that such change is generally difficult to achieve and the realized changes can be surprising and sometimes unwanted (Jarzabkowski et al. 2019). Although our evidence hints that ideology can ultimately shape vicarious learning outcomes—and even though it is theoretically reasonable to assume that variation in communication practices may be related to organization-level learning outcomes (e.g., Ocasio et al. 2018)—further elaboration of this link requires more research.

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industry. Authorship is listed in alphabetical order. Both authors contributed equally.

Endnotes

¹ Throughout this paper, we refer to the individuals engaged in the primary vicarious learning activities (i.e., observing, reading, listening to others) as *observing individuals*.

² This is not to say that learning does not have a tacit dimension—it does (e.g., Winter 2006, Polanyi 2009, Szulanski et al. 2016)—merely that explicit communication is an important aspect of organizational vicarious learning. Vicarious learning based on sharing tacit knowledge, for example, through mentoring or apprenticeship, is outside the scope of this paper (e.g., Leonard and Sensiper 1998).

³ We may still observe the influence of ideological heterogeneity within capitalism (e.g., Park et al. 2020).

⁴ The importance of communication is also emphasized by related literature on the attention-based view of the firm (Ocasio 1997), absorptive capacity (Cohen and Levinthal 1990), and knowledge transfer (Szulanski 1996). The attention-based view emphasizes the role of organizational structures in shaping what individuals attend to and whom they talk to about their observations with one another (Ocasio 1997). For example, Rerup (2009) discusses the role of organizational structure in shaping whether organizations develop multisided views of rare but important events (e.g., crises). Recently, Ocasio et al. (2018, p. 157) called on researchers to look beyond “the ‘pipes and prisms’ through which information flows” and “more explicitly consider the content and practices of communication.” Cohen and Levinthal’s (1990) paper on absorptive capacity emphasizes the mutual interplay of organizational structures and processes and individual expertise in determining an organization’s capability to identify, assimilate, and utilize external information. In the knowledge management literature, Szulanski’s (1996) seminal paper emphasizes the importance of “fertile” organizational contexts and the ease and frequency of communication as well as the relationship between senders and receivers of new information as key enablers of intra-organizational knowledge transfer.

⁵ Efficiency was not a primary organizational goal before the industrial revolution (Ogilvie 2004). Relatedly, organizational learning was not a primary issue for almost any organization (notwithstanding some exceptions, such as the Prussian army and Jesuits) and individual development was the primary goal of what we could label as observational learning. Merchant houses, for example, sent new generations on “grand tours” (Adler 1989, Chard 1999) with the idea that traveling and the observations gathered would result in more professional conduct as entrepreneurs and members of bourgeoisie elites although the idea that their organization would learn directly was rarely considered as having any meaningful importance.

⁶ Please see <https://www.ica.coop/en/cooperatives/cooperative-identity#cooperative-principles> (accessed December 23, 2019). Both cooperative organizations in our study were members of ICA (Hilson 2011).

⁷ Throughout the paper, we refer to the focal organizations as “retail organizations” based on the sector in which they operated, but no single term can capture their true identities over the entire study period. Their original mission was to operate as purchasing and logistics organizations for their member-owners. However, this original mission changed over time to include both manufacturing and retail-related activities.

⁸ The intended audience of the reports was often the top managers of the organizations, but occasionally, travel-based observations were disseminated more widely (e.g., internal publications, newspapers). Most of the reports were written in a single voice, and a minority resembled more the minutes of a meeting among the observing individuals (allowing diverse viewpoints). In most cases, the travelers

were members of the studied organizations. In some cases, the travelers were not organizational members yet reported to the organization because it was the financier of the trip (e.g., K retailers, who sometimes traveled, were not employees of Kesko). Closely related organizations also organized some trips (e.g., Suomen Tukkukauppiain Liitto, which was a professional association of wholesalers closely associated with TUKO). We categorize the available evidence on the basis of the central organization to which the travel report was most closely related (i.e., Kesko, SOK, OTK, or TUKO).

⁹For earlier research from the research project see, for example, Lamberg and Tikkanen (2006) and Lamberg et al. (2009).

¹⁰All 10 informants had work histories in concept planning and chain management at Kesko (4), TUKO (3), or SOK (3). Some had worked in the studied organizations during the period of investigation, and others worked in these organizations after this period, which provided a contemporary view of the phenomenon.

¹¹This is a summary of a discussion concerning a trip to Sweden in 1968.

¹²Salonen's idea, although presented in a rather unimposing tone, was remarkable at the time. OTK was the central organization of de jure independent cooperatives at one time. Elanto, based in Helsinki, was just one—although the largest—of these cooperatives. The proposal to use the Elanto brand name in all cooperatives amounted to a radical change in the identities of locally operating cooperatives. Moreover, centralized brand management activities associated with the use of a nationwide retailer brand would have radically shifted power from the cooperatives to the central organization. The proposal did not lead to any concrete changes at the time.

¹³We are grateful for our second reviewer for reminding us about some of these competing explanations.

¹⁴An example is Eino Perttilä's presentation to the supervisory board of Kesko (in 1982).

¹⁵In 1974, Finland was politically dominated by social democrats, and communism was a popular activist movement in the country.

¹⁶An example is the annual report (of 1980).

¹⁷This is from *Osuuskauppalehti*, October 21, 1955.

¹⁸We discuss the ideology of socialism here in relatively general terms. The practical manifestations and consequences of the ideology are, of course, multifaceted (see, e.g., Kogut and Zander's (2000) study of capitalism versus socialism in the context of innovation).

¹⁹See Kalevi Suomela, E-lehti, nro 3, October 25, 1986, p. 21 / *Osuusliike* 281.

²⁰The exception to this rule is his suggestion (1954) to use the Elanto brand across OTK's cooperative shops as cited earlier.

²¹OTK, as with all the organizations in our study, had a dual-board structure with a supervisory board that was responsible for governance and an executive board (board of directors) that was responsible for management.

²²See Helsingin Sanomat, May 21, 1982.

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