



Evert Gummesson

Case Theory in Business and Management

Reinventing Case Study Research



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THE BUSINESS AND MANAGEMENT CONTEXT

Research methodology in the social sciences is mostly presented as generally applicable. My experience is that even if a research method has a generally valid core it has to be adapted to each specific context in which it is applied. This chapter will therefore outline the properties of business and management contexts. Further, research is performed by people, which means that their persona affects the result.

University students usually have limited personal experience of business and management and this chapter therefore offers an account of its overriding characteristics. Even those with work experience may profit from it; practitioners are stressed by ongoing events and rarely have the time to reflect on what they are doing and why.

In a broad sense, business and management disciplines embrace suppliers which can be business firms, government organizations or non-government organizations (NGOs). Among the sub-disciplines are accounting, costing, finance, marketing, operations management, leadership, organization and human resource management. They also embrace the users which are households where the members are both citizens and consumers.¹ This is studied at universities, business schools, schools of management and institutes of technology.

It is important that the unique features are taken into account when a methodology is chosen for a specific study. If not, we risk methodologies taking over that are ill-suited to uncovering the essential properties of our object of study and risk the study being evaluated from the ability to use a certain research technique and not for the value of the outcome of the study. In the numerous books and articles on methodology, I can hardly find the basic conditions of business and

¹Considering the large number of visitors and immigrants today who are not citizens, it would be more appropriate to talk about *residents*. To avoid too many terms, citizen will be used to include all residents and to stress the difference to the role of consumer.

management reality noted at all.² The literature on qualitative methods (where case study research is traditionally placed) refers to the social sciences in general. Although social science disciplines overlap – for example, in the study of organizational decision-making, consumer attitudes and employee motivation – there are also topics and perspectives that keep them apart. Some years ago I came across a PhD dissertation in sociology dealing with service and it had no mention of the extensive service research that had been done in business schools from the 1970s onwards, and that had produced thousands of publications. The sociologists were not aware of it because they did not search outside the boundaries of their discipline.

Institutional factors that characterize the object of the research have an influence on the choice of methodology and how data is accessed, generated and interpreted and how conclusions can be drawn and implemented. For example, the basic elements of statistical surveys – sampling, statistical processing, response rate, etc. – may be similar but applying them to voters' political preferences during an election campaign is different from applying them to customer satisfaction with cars or bank service.

Among the more obvious contextual influences are national and cultural dimensions. For example, many Northern European companies are more transparent than Chinese and US companies. This affects the information that can be generated in interviews with managers and employees as well as the access to documents.³

More than half a century ago, business and management disciplines began to distance themselves from economics. It was not noticed at first and even today conventional economists have not noticed it. The gap has grown and today you hardly ever find a reference to economists in a textbook on marketing or accounting and you never find references to business and management research in economics textbooks.

Theory in business and management disciplines is developing continually, not least because of the dynamics of markets. For example, the breakthrough of IT in the 1990s has changed communication, and the relaxing of planned economies in favour of deregulation and privatization has led to profound changes in the behaviour of organizations and households. We still have to learn to handle the new situation and traditional economics has shown little ability to address it.

The abundance of literature on methodology in the social sciences gives me an uncanny feeling of being exposed to Harry Potter-like witchcraft and wizardry beyond my intellectual comprehension. For example, I study a handbook on

²Three quite different books specifically approach case research in a business and management context: Woodside, 2010, Baker and Foy, 2012 and Saunders et al., 2012; and they all show differences and similarities to case theory.

³See Box 9.4 on interviewing in Chinese guanxies.

qualitative research (over 1,000 pages) and it is a goldmine in many respects. But gold does not come in pure form; it is embedded in rock and the trick is to extract the gold grains and occasional nuggets. Of the 59 authors of the handbook, 21 come from pedagogics, 17 from sociology, 10 from anthropology, 8 from communications and 3 from other areas. One chapter explains that economics, sociology and political science receive the bulk of social science research money and dominate social science publications.⁴ However, economics and political science are not in the book, and psychology and business and management are marginally mentioned. In reviewing the Second International Congress of Qualitative Inquiry, Lee (2006) noted that out of about 200 sessions, only 1 was dedicated to qualitative research in management disciplines. He concludes that this is the qualitative researchers' own fault rather than unwillingness by the of the congress hosts to accept presentations based on qualitative research. Flyvbjerg (2001) claims that every discipline that does not make systematic case research is ineffective.

The following sections elaborate on the distinctive features of today's business and management reality. They are my personal perception and interpretation based on my experience as a practitioner, a university professor, a consumer and a citizen. So feel free to add an additional or differing experience of your own. The chapter ends with human behaviour aspects referred to as persona and researchscapes.

Business Firms and Financial Organizations

Business firms are the key players in free (capitalist) economies as opposed to planned socialist economies where production and sales are part of government. Within its business mission, a firm must set up goals and generate a certain profit adequate to get the firm going, surviving and sometimes also growing. The revenue must be big enough to pay the daily costs and to allow investment in product and market development, new equipment and replacements. Costs must be under control, especially as businesses and markets are exposed to ups and downs. Businesses should live on what they produce and sell and on how well this adds value to owners, customers, employees and citizens. The trend of business and management being about maximizing profit and management bonuses is getting so pushy that it jeopardizes economies and societies.

In corporate strategy we used to talk about a *business mission* as the *raison d'être* of a firm. It should be what it says – a mission. That means a desire to do something that adds value to customers, citizens and others, and from that earn

⁴Greenwood & Levin, 2005, p. 53.

a living. There is reason to recall the philosophy of the great industrialist Henry Ford. He is remembered as the man who redesigned the car to fit the wallet of ordinary Americans. His focus was on how to solve this technically. He was proud of being in the automobile business; it was a lifestyle. To do so he introduced mass manufacturing and the assembly line, known as 'fordism'.

Ford's memoirs offer a wealth of wisdom, for example: 'greed blocks the delivery of true service' and a well-conducted business 'cannot fail to re-turn a profit, but profit must and inevitably will come as a re-ward for good service. It cannot be the basis – it must be the result of service.'⁵

In the professions, people were originally driven by a *calling*. Being a medical doctor or a lawyer was a calling to help others. The strongest driving force in healthcare today is not to cure patients but to make pharma companies rich; and the legal profession and chartered accountancy seem to have maximum fees as their 'mission'. The mission of creating a just society and stopping fraud and crime is upheld by a minority of true professionals.

In recent decades, investors, financial analysts and the media have become increasingly aggressive in demanding continuous growth of shareholder value. The short term has taken over and investment in long-term industrial projects has become difficult in the West; it is discouraged by the financial market. If the share price was a rational issue based on revenue minus cost, it would be easy. But it is largely psychological and influenced by expectations about the future, media hype, public relations campaigns, brand management, rumours and intentional manipulation by financial actors such as banks and brokers.

When companies start they are very much linked to the owner. Ford and Ericsson are examples where the family name remains even after they were listed on several stock exchanges. The modern corporation with limited liability (with Inc., Ltd or Pty after the name) and ownership and responsibility separated from a private economy made it possible to start companies with few or no funds of your own. In came the hired chief executive officer, the CEO, 'the professional manager', to run the company. Ordinary people could become small owners through stock exchanges but they do not know from day to day who has power over the company.

Gradually, ownership in the old sense has become rarer. A business is largely anonymously controlled by the price of its stock on exchanges and those who speculate in a stock going up or down. Since international deregulation, trade goes on 24/7. With computers and sophisticated algorithms, *high-frequency trade* has been introduced, characterized by short-term investment, high speed, high turnover, high volumes and high cancellation rates, thus creating a highly volatile market.

The business mission has got lost and faceless owners only look at the bottom line of their stock portfolio. But there are exceptions. Small, local companies often have family ownership and are known. Founders of major

⁵Ford, 1922/2008, pp. 10–11. See also Bejou (2011) on 'compassionate business'.

companies can become strong brands, for example Richard Branson (the airline Virgin Atlantic), Warren Buffet (the world's most successful investor) and Ingvar Kamprad (IKEA). Sometimes a hired CEO is turned into a celebrity to give a human face to a company, although he/she is not a dominating owner (e.g. Jack Welch, General Electric).

In capitalist economies, the ideal market is described as 'free'.⁶ The economic philosopher Adam Smith is best known for the concept of *the invisible hand*. It refers to the interaction between limitless numbers of suppliers and customers whose self-interest in getting the best deal sets a market price where supply and demand meet. This is explained in microeconomics but its assumptions are not viable today. Despite this, the free market idea with all its limitations, but supplemented by regulations, has worked better than the alternative – a socialistic economy planned and controlled by government. The economist Milton Friedman has been a passionate crusader for free markets. The economist Milton Friedman has been a passionate crusader for free markets and says that it is the only way to get people collaborate voluntarily. The world runs on self interest and therefore individual freedom has to be preserved. He does not claim this to be the most desired state but it does the least harm.⁷

Completely free and completely planned are extremes that in real life are no more than exceptions. The extremes do not represent real-world complexity. Markets are an amalgamation of free forces, plans, efforts to control, trickery to exploit ignorance, diversion from the important, practices, and so on. However, cherry-picking quotations can become misleading. If you really read Ford, Smith and Friedman, you will find that their knowledge was deeper than the popular quotations disclose.

In a free economy the idea is that businesses should be in competition. This increasingly stretches out on a global basis through the European Union (EU), the World Trade Organization (WTO) and other alliances. Competition is a self-regulatory mechanism that can counteract complacency and force companies to adapt to changed conditions and strive for improvements and innovation. There are also monopolies and there may be weak competition if the industry members are traditional and passive or markets have been divided between cartels. The increasingly fierce global competition, especially from Asia, has alerted US and European industries and is a driving force for Western economies. All industries, however, are regulated in certain aspects to curb the sale of dangerous and unhealthy products and other types of misconduct, but this is only partially successful.

⁶For a recent analysis of free markets and capitalism, see Kotler, 2015.

⁷See further Friedman & Friedman, 1980. Friedman has stated this in many debates and interviews, see Youtube.

As with anonymous ownership, the 'free' economy has run out of control and opened up for major scams referred to as 'creative bookkeeping' where complexity is used to conceal irregularities.⁸

There are countless *business models*. As consumers we are mostly in contact with retailing models when we go shopping, for example at a Tesco supermarket. Internet sales now dominate some retailing markets like Amazon for books. In franchising, an independent company may use an established firm's business model and get support from the franchisor, for example Hilton Hotels & Resorts. In air travel we find full-service airlines like Lufthansa and 'no-frills' airlines like Ryanair that compete on price in the first place. Every company's business model is unique in a major or minor way but it is not unique forever. It can become dysfunctional because of market changes or get disrupted by new technology and new systems solutions. The threat often comes gradually and it has turned out that, especially if the change is major, many established companies will have great difficulty in adapting to the new situation even if they are aware of the threat. Kodak, the leader in everything in photography, is an example; new electronics made their knowledge and products obsolete.

Financial organizations are brought up here as they exert so much power on the economy, both for good and bad reasons. The serious side of financial organizations is that they let people deposit money, save money and make cash transactions; lend money to people against an interest rate; offer insurance against damages, accidents and ill health; and offer retirement plans. Companies need to borrow money to expand or solve a temporary deficit or may need to deposit a surplus and get paid an interest but still have easy access to their money. Financial organizations also assist with mergers and acquisitions and introductions on stock exchanges.

Money is only a representation of value; it has no value in itself – it is just intended to facilitate transactions between sellers and buyers. First, humans were self-sufficient, eating what nature offered by picking berries, hunting and fishing. Then they started to cultivate land, grow vegetables and other plants and keep animals. The next step was to swap things with neighbours, for example getting potatoes in exchange for carrots.

An anomaly in the market economy is that 'money', once introduced to represent value and facilitate exchange, has become a product in itself. There is a 'money market', in more fancy language called the 'financial market', just like there are markets for rice, clothes and tattoos. Even more anomalous is the fact that those who trade money have power over customers and have figured out ways to mislead and milk them.

The original idea of finance has largely got lost. It is less supportive of actual value creation than it should be. Speculating to get rich quickly – filthy rich – without

⁸See the Enron case in Box 9.3.

working for it is probably part of human nature and the financial sector is exploiting it. *Financial instruments* have been introduced which are sold to consumers who have little ability to understand the risks. *Shadow banking* (banking outside a regulated system) has increased. There are financial institutions that embezzle people's savings by recommending investment in funds from which only the seller can make money while the buyer takes the whole risk. Especially in the USA but also in new market economies like Russia, the business firm's perception of its goal is simple: *the maximization of short-term profit and shareholder value*. It is odd that an individual is expected to be a responsible citizen, while a group of people – a business firm – is not.

The deregulation and globalization of financial markets have opened up the possibility for banks to risk the money of whole nations, its citizens and taxpayers. Iceland and the USA are recent examples. The financial crisis that started in 2008 and was still in bloom in 2016 would most likely not have occurred on such a grand scale if markets were regulated. On the other hand, deregulation may have made other financial markets more efficient. All this is little known to science and to get anywhere research has to address the complexity of economic life – which is the purpose of case theory and will be further explained in later chapters.

It is especially critical in financial firms where, for example, you buy savings funds for your retirement. Who manages your money and who owns the financial firms? The money may be in a tax haven and the biggest owner may be a Russian oligarch.

When this book was being written, an article, 'American capitalism's great crisis' by Rana Foroohar, appeared in *Time*. Foroohar has also written a bestselling book, *Makers and Takers: The rise of finance and the fall of American business*.⁹ One of her findings is that *the financial sector takes 25% of all corporate profits but only represents 7% of the economy and 4% of all jobs!*

In summary: business is complex and consequently the research methodology-in-use must be able to handle that. Today, the methodological mainstream cannot.

Government Organizations and NGOs

National, regional and local governments – referred to as the government or public sector – are essentially non-commercial organizations. Non-government organizations (NGOs) are also primarily non-commercial but are operated on private or group initiatives.

⁹Foroohar's book (2016a) and article (2016b). See also Brown, 2007, 2013, and the Public Banking Institute, CA, USA.

Their goal is not profit but basic service to society and its citizens. Governments get their primary funding from taxpayers (citizens and companies); NGOs get it from governments and donors. But the commercial versus non-commercial categorization is seductively simplified, which shows the need to study the complexity of organizational structures and processes. The democratic system elects presidents and political parties to power for a period based on promises in political campaigns. It is easy to see how vulnerable and often dysfunctional this system is. While consumers in developed countries have many individual choices in competitive markets, democratic means either/or for everybody. For example, when there was a referendum in Norway about membership in the EU, 52% voted against. In Finland it was the other way around – 57% voted for. So Norway did not become a member but Finland did. After that, citizens and organizations have no choice but to comply. However, membership of the EU is not a crisp set; it is fuzzy and each membership therefore has to be treated as a specific case.

To increase the efficiency of public organizations, certain concepts have been taken over from the private sector. This is referred to as *new public management*. It was especially promoted by the UK Prime Minister Margaret Thatcher, who saw the necessity to get her nation more value-creating by being more competitive, more cost-effective, more service-minded and more citizen-oriented.

Decentralization, outsourcing and privatization were made possible through deregulation, a key strategy worldwide. Unfortunately, the strategy has often run amok. There is always a trade-off between regulations and the free market, and between what private business does best and what needs to be handled through government organizations, NGOs or the citizens individually. The mission of hospitals was once to help patients, of schools to educate young people, of lawyers to uphold justice and of universities to appoint professors who were free to do the research they found important and to be higher-level educators. Today, finance has expanded its influence over the health sector, research, education and legal matters. Most of the time of university professors goes to raising research money, managing departments and reporting their doings, to be 'evaluated' by politicians, bureaucrats, students, accountants and bibliometric systems. A high trust and high ethics society based on values has been replaced by a formal control society. The opposite to the new public management is equally detrimental, as we have seen from the live experiments with regulated, planned and tightly controlled societies such as the former Soviet Union and currently existing dictatorships.

The mission of the government sector was once primarily to keep people down and give unchallenged power to presidents and their governments. This is still so in many countries but progressively the government sector has become a service sector to render value to citizens. New public management challenged the efficiency of the public sector as a service and value-creating sector. It is still

not in many ways, one reason being that too much influence comes from people trained at law school, who turn law into an internal parlour game without any sense of their service role.

NGOs are basically non-profit organizations. They are closely related to *cooperatives*, which are owned by the users. They are commercial but as the owners and the customers are the same people the surplus stays with them. The cooperative movement was highly successful in local retailing, housing, savings banks and mutual life insurance. As the physical proximity and close interaction between those involved was reduced, cooperatives lost their true content. Most of them have become like any other large business, but there is growing interest in re-establishing the originals. One example is Skandia Liv, a leading pension fund in Northern Europe, which, in 2014, was reconstructed from a commercial business into a mutual fund. The Internet, its social media and the focus on interactive relationships that are not dependent on physical proximity have also given birth to a new type of global customer community.

Traditionally NGOs have picked up the 'leftovers' from businesses and governments. Leftovers are not the same as insignificant; on the contrary, the issues may be highly urgent to solve but they are not rooted in official institutions. NGOs may grow and become institutions in themselves, like the Salvation Army and the Red Cross which were founded 150 years ago, the scout movement 100 years ago and the environmental and consumer interest groups that have emerged in recent years. Such issues are constantly being taken up through the initiatives of citizens but the lead time can be long; for example, equal rights for women have been on the agenda for more than a century. The causes are operated both by voluntary citizens and hired executives and employees. They can be commercial in some respects, but their mission is to serve citizens and the welfare of society in areas where business and government fail; it's not to make a profit. Political scientist Elinor Ostrom (a Nobel Prize winner in 2009) has studied *the commons* and how ordinary people take charge of local services that are not adequately handled. Examples are child and elder care, security in the streets, pure water supplies and garbage disposal. It is close to an NGO but it is less formal and can rather be described as a network of relationships between likeminded citizens who feel they have a responsibility.

Hybrid Organizations and Networks

In very rough terms, small and medium-sized companies (SMEs) constitute 95% of the number of companies in a country and account for half of business revenue and employment. The division of big companies and SMEs is reminiscent of the past, and big company and SME are unfortunately used in official statistics

as overriding categories, thus distorting our image of what business firms are. They are networks which compete with networks. Statisticians should rethink this but they don't want to. It would force them to use new procedures – but would make their work more exciting and useful.

A business has a formal core. As a legal entity, it is expected to follow laws concerning accounting, taxation, etc., but *operationally* a company is far from well defined. Percy Barnevik, former chairman of the electrical giant ABB with 200,000 employees, described his company as a network of 5,000 small enterprises of local and domestic character. To that we can add part-owned companies, alliances with competitors and customers, joint ventures with governments and other forms of resource integration and collaboration.

In reality, our economies consist of numerous hybrid organizations that are embedded in vast networks. It is necessary to recognize this complexity. Today, it is often difficult to discern which organization is commercial and which is not. In some countries, the national government controls major industries; an example is the North Sea oil operations in Norway. In Japan, business and government are highly intertwined, not least through personal and social networks. The USA claims that it is a free market economy but government contracts on building and construction, war equipment and other products are also offered on political grounds to support industries which, in return, employ more people and give election campaign contributions. Government agencies also start their own incorporated subsidiaries. These fall under the laws of business enterprises which, apart from working for their parent company, may compete on the open market. So government gets involved in commercial activity. Work that was once performed by in-house units is increasingly outsourced to private companies. Deregulation and privatization have led to companies taking over hospitals, schools, local transportation, water supplies, part of the military defence and other basic services that in many countries are seen as a citizen's right. For example, the NGO 'Ashoka: Innovator for the Public' combines social entrepreneurship with business thinking and collaboration with business firms in developing innovative solutions to social problems.

The discussion shows that categories like business, government, NGO, supplier and customer are too simplistic to function as platforms for research. The specific conditions of each case must be considered. The categories are fuzzy and thus overlapping, leading to ungrounded generalizations. If categories are too loosely defined with high intra-variation, they do not serve as tools to understand reality. Not only are apples mixed with pears, but also with raspberries, potatoes and what have you. This simplicity is damaging to the validity of research.¹⁰

¹⁰Categorization is further discussed in Chapter 5.

Households: Organizations of Citizens and Consumers

The organizations mentioned so far are conventionally categorized as suppliers while households are categorized as consumers. A household can consist of a single person but often includes mother, father and children, and in some cultures several generations. They are the smallest organizational units but they are powerful as there are so many of them. Simply put: households are half of an economy as you cannot supply more than is consumed.

Customer orientation is held up as a key strategy in competitive markets. You have to understand customer needs and wants, how to establish relationships with customers and how to retain them. Although basic, the customer-in-focus strategy is not well understood by many businesses, who often treat customers with inertia, rigidity and insensitivity. To improve their operations, companies both observe and discuss with customers. Some firms are sensitive to signals in the market while others are not. Companies also engage in formal marketing research but the value of the information is highly dependent on the choice of research method. The most popular techniques to try and learn about customers are satisfaction surveys, personal interviews and focus groups. They may offer data that can be transformed into decisions and action but only after reflection and interpretation.

The taken-for-granted categorization of suppliers and customers used in mainstream research does not reflect reality. A more realistic alternative is offered by Service-Dominant (S-D) Logic, where all stakeholders are co-creators of value and resource integrators.¹¹

Both consumers and organizations have to look in their purse and see what they can afford or buy on credit. The business mission of IKEA was to make furniture cheap and available for ordinary consumers. Consumers take over part of the work by travelling to IKEA stores, collecting the furniture in flat packages from the shelves, carrying heavy objects to their car, getting them into the car and driving home. Then they carry and assemble the pieces, and finally get rid of the packaging material. As the cost of transportation and assembly is high, the price can be kept substantially low in this way. The customer becomes a co-creator of value. IKEA also sells office furniture and small firms especially constitute an important customer segment.

We should note that businesses, governments and NGOs are not only suppliers but major customers as well; they constitute the *B2B* market. They need to buy to be able to produce. Further, *customer-to-customer interaction* (C2C)

¹¹See Lusch & Vargo, 2014; Gummesson, Kuusela & Närvänen, 2014; and Box 6.5 on S-D logic in theory generation.

has become an increasingly important concept in business. It has always been around, sometimes as *word-of-mouth* (WOM) where customers inform each other about what to buy and what to avoid. C2C is broader and has gained further ground through the Internet with social media and online consumer communities.

Ethics, Crime and Corruption¹²

Ethics is rarely one of the heavy subjects at business schools. Crime and corruption are not on the curriculum at all, despite the fact that they are omnipresent and rapidly growing. By not actively opposing this unfortunate development we support it; once established it is difficult to get rid of. It is a sad fact but there is crime and corruption in any market and any organization. They should have a place in business and management research and education. They do not disappear just because we pretend they do not exist.

The official US definition of organized crime embraces (1) the illegal monopolization of markets and business deals; (2) the use of planned corruption; and (3) the use of threat, force and violence. Today, advanced organized crime is operated like a business and is often extremely efficient. Its top 'executives' do not look like crooks; they may have graduated from the best business schools. Criminal organizations act as both competitors and collaborators within market networks, trying to control network nodes, links and hubs.

Crime is global but largely invisible. It includes drug trafficking, the illegal weapons trade, prostitution, extortion, etc., and one of its latest 'products' is immigration to the EU. In my country, Sweden, the politicians and most of the inhabitants do not understand it. Mafia organizations organize travel, teach their 'customers' how to exploit social security in Sweden and that the police and other authorities do not have the knowledge or capacity to be a threat. The immigrants and their families are mafia customers, yes, because the mafia charges high fees to get them going.

Laundered money increasingly ends up as 'white' when crime syndicates buy stock in legitimate companies, mostly without the companies knowing who the buyers are. As their financial muscle is strong, these crime syndicates can exert considerable influence. According to our research, crime is the fastest growing economic sector. Four major changes in market conditions are unintentionally stimulating the growth of crime: the Internet and mobile communication, the EU, the high-speed economy and the global financial crisis. Crime offers new opportunities as regulations and institutions lag behind, not just for months but

¹²This section is mainly based on Bagelius & Gummesson, 2013.

for years and decades. In this time of unemployment, organized crime has 'scouts' looking for young people on the streets who display suitable talent, and offering them jobs and social belonging.

If shop and restaurant owners are forced to pay a percentage of their income for 'protection' or to buy pirate copies from organized crime, the market and competition become dysfunctional. Bribes and kickbacks are common in the building and construction business. If the buyer is a government organization this is particularly grave. The cost is raised for consumers and taxpayers and quality is reduced.

Unfortunately, we have taken a step back to the time when robber barons ruled. Today, there are huge corporations as well as small businesses and banks that run a cowboy economy. The extreme focus on profit has given birth to the concepts of *corporate social responsibility (CSR)* and *corporate citizen*. In practice, this is too often ignored or handled by public relations departments through white-washing and green-washing of corporate activities, often decorated with charity. There are seriously meant exceptions though. Warren Buffet, the long-term investor who has gone against Wall Street's short-term speculation and become one of the world's richest men, considers it his mission to support society and be a good citizen. He uses his power to encourage others to follow suit.

There has always been crime and the police, courts and other law enforcement institutions are assigned to hold it back. These institutions have an impossible task today when it comes to truly organized crime. People have gained their image of organized crime from TV and film where crime is thrilling and romanticized by celebrity actors and elevated to culture and art status, for example *The Godfather* trilogy of films and *The Sopranos* TV series. However, TV and film are sometimes far ahead of business schools in explaining how business reality works.

Corruption exists in government sectors and is a necessary condition for organized crime. It is often invisible to the public and to those who work in an organization and if people suspect foul play they get frightened. *Whistleblowers*, those who report irregularities, too often get in trouble. It may give rise to the idea that a nation is free from corruption, a naive conclusion. Organized crime cannot exist without the support of people in key positions in national, regional and local governments, as well as politicians and specialists like lawyers, bankers, accountants, brokers and medical doctors. It needs loyal 'friends' in the legal system. It leads to a widespread but covert corruption.

When presenting our research on crime, we have sometimes got comments from academics that this has nothing to do with business and management; it is handled by the legal profession and criminologists. We object to these reactions. Crime does not seek publicity and takes measures to cover up its activities. Its actual size is not known – there is a 'dark number' – but

estimates are continuously made. One of our efforts to bring together the data of economic crime landed at an estimate of US\$2–3 trillion (1 trillion corresponds to 1,000,000 million) for 2012. It equals the GDP of France (US\$2.8 trillion) or the collected GDPs of Greece, the Netherlands, New Zealand, Spain and Switzerland.

The ugly face of organized crime has been accounted for by many serious authors. Among the most noted in the past few years is Roberto Saviano's¹³ books based on in situ observations of organized crime environments from childhood and his dedicated and reflecting research. It has its price; he is on the death list and cannot stay alive without high security. When I interviewed him, he was accompanied by heavily armed police officers.

From a large number of cases, sociologist Paul Blumberg (1989) concludes that competition in the market economy has a built-in weakness: it forces companies to cheat to be able to survive. Based on his personal experience, Perkins (2004) explains how governments use 'economic hit men' to force other countries to cooperate. A hit man is a killer-for-hire but the economic hit man does not use physical force. For example, he/she offers governments seemingly favourable loans to build roads and other infrastructure which after some years are found to be debt traps.

Corporate crime is committed by a company or other organization by its owners, management and others in control for the benefit of the company or organization. Occupational crime occurs when people misuse the trust of the employer to acquire personal gains. Recent cases of corporate and occupational crime are Elf-Aquitaine (France, oil), Enron (USA, energy), Parmalat (Italy, food), Systembolaget (Sweden, alcoholic beverages) and Yukos (Russia, oil). In 2013 the largest bank in the USA, JP Morgan Chase, was fined \$13 billion because of its subprime loans for housing that were a major cause of the 2008 global financial crisis. Wrongdoings can go on for a long time without being detected. A question in a business paper about Enron's profitability triggered the disclosure process. Warnings had already come from business partners and a whistleblower inside Enron but these were ignored. A warning from Bank of America revealed the irregularities in Parmalat.

Although there are criminology and emerging institutions to detect and punish organized crime, they have very limited resources. Organized crime is quick to act, can be extremely efficient and immediately punishes disobedience.¹⁴

¹³Saviano, 2006, 2015. See also *Gomorra*, a movie based on his first book and a recent TV series with the same title. They show the ugly reality of organized crime.

¹⁴For further information, follow the financial press and read books by judges and others who have seen crime and corruption from the inside. *Transparency International* is an NGO that watches over corruption and takes measures. However, I find their rankings partially superficial, not observing the more subtle ways of corruption.

Economic Sciences

This section broadens the business and management context to the *economic sciences*. These embrace several disciplines but economics is still perceived by most people as the leading discipline. Economists dominate the public debate and dominate as advisors to governments and political parties. Professors of business and management are less visible. Many think that economists represent the core of the economic sciences and can answer all types of questions where economic issues are involved. They seem to think that themselves. The Nobel Committee thinks so. But it is not true.

Economics has its core in overriding macro issues and is by no means a unified science. In the 19th century it was named 'the dismal science' by the historian Thomas Carlyle, as opposed to the skill of writing poetry which was named the 'gay science' ('gay' then still meant 'merry' in a general sense). In my perception, macroeconomics addresses one of the most complex issues of social life. It has to deal with a series of 'dismal' issues: inflation, depression, poverty, taxation, unemployment, financial crisis, etc. It has got stuck in fragmented theory and old mathematics but should learn from modern physics, the humanities, case theory, action research and the many business and management disciplines.

Business and management now form the largest and fastest growing area not only in the economic sciences but in all the social sciences. On a worldwide basis, business and management as a whole is at least 10 times as big as economics. Other economic sciences include economic history and economic elements in law, sociology, psychology, political science and statistics.

The word 'economy' originally stood for 'household management' and 'thrift'. It was about how to survive on scarce resources and make the best of what we have. Economic philosophers, who were not economists in today's sense, took an interest in the wealth of nations, the world market price of rice, the role of manufacturing versus services, and a number of other topics, both conceptually and as practical issues. For example, Anders Berch (1711–1774), the first Professor of Economics in Sweden, did a longitudinal study of how to design the most efficient plough. At that time, agriculture was the dominating economic sector. He not only tried different solutions in theoretical terms but he had the ploughs made and literally did field tests of their functionality.

In books on economics, there is ample reference to people who have developed philosophies and practical ways of controlling economic issues. Economics was first a part of social philosophy and developed into macro- and microeconomics. Although called *microeconomics* it rarely went deeper than 'industry' or 'sector'. It did not deal with the real micro issues, such as the behaviour of people inside an organization, the role of leadership, how consumers behave in markets, etc. This micro-micro behaviour, which should constitute the substantive data

and input to the micro and macro levels, was neglected. Microeconomics became *pure theory* and if the value of a single variable was changed, the *ceteris paribus* principle was applied, meaning that all other variables were kept constant. But a complex context like the economy never stays the same. Microeconomics is also called *price theory* which is what it really is.

For decades a large number of economists and others have tried to infuse realism into microeconomics and the pure theory has become a heavily *patched theory*. *Managerial economics*, based on microeconomics, was an antecedent to business and management. It was an effort to apply economic theory to decision-making in organizations, but not to how decisions were implemented and led to results. Then it became *the theory of the firm*, *the behavioural theory of the firm* and, today, *behavioural economics*. Microeconomics hangs on to outdated roots and is stuck in the positivist paradigm which puts quantification – the numbers language – in the centre, instead of the issue as such. If an existing theory is continually amended, it loses its uniqueness. Still, scientists are reluctant to abandon such theory.

One of the many who have tried to turn microeconomics into viable theory is Ronald Coase. He introduced *transactions costs* and *social costs* in two short articles, one from 1937 and one from 1960.¹⁵ Although he won the Nobel Prize in Economic Sciences in 1991, clearly displays pragmatic wisdom and is heavily cited, his impact on management and business seems low. In ‘developing’ behavioural economics, economists seek help from psychology without knowing that their ‘discoveries’ have long been found in the marketing literature, even in undergraduate textbooks. Despite this, behavioural economics is heavily promoted as an innovation. In 2012 the prominent marketing professor Philip Kotler sent me the following email:

The irony is that the marketing field has been doing behavioural economics for 100 years without calling it behavioral economics. We discovered that producers, middlemen and consumers make decisions that are influenced by a mix of rational and emotional factors and have spelled out how the economy and competition work on this basis. Ever since marketing has become customer-oriented and introduced segmentation theory, the field has been delivering behavioral economics in every way but in name. The economists would do well to acknowledge marketing as the core economic activity of all institutions in adapting to a changing marketplace and as actually altering the marketplace through its strong branding and innovation activities.¹⁶

¹⁵For a synthesis and overview, see Coase & Wang, 2011. It is also a reflection on whether microeconomics can be applied to the growing Asian economies, especially China, and the conclusion is in line with the complexity paradigm: it has to be treated inductively and the theory has to grow from the real world and not be deductively forced into received Western economics.

¹⁶See also Kotler 2016.

Box 2.1 on the Nobel Prize in Economic Sciences provides a case supporting this quote. I also checked some of the most common economics textbooks from the 1960s and up to 2016 and the concept of marketing is not even mentioned. It shows how far apart even seemingly close disciplines are and that the much acclaimed interdisciplinary research is difficult to implement.¹⁷

Box 2.1 The 2010 Nobel Prize in Economic Sciences

Same procedure as last year: the Prize was again given to economists although it is a Prize in Economic Sciences. In 2010 it was shared between 3 professors of economics 'for their analyses of markets with search frictions'. Being educated in microeconomics, where price regulates everything automatically towards an equilibrium and buyers and sellers find each other instantly, they 'discovered' – in the 1970s – that there were frictions and search costs in the market.

I sat in at their official prize lectures in Stockholm. One of the laureates began by answering the question 'What are search frictions?':

Perhaps the best way to answer the 'what' question is by example. Two years ago my wife and I decided that it was time to move from our home of 35 years to a more comfortable and convenient condo. The apartment had to be relatively large and on one floor, with a view of Lake Michigan. With these features in mind, we consulted several agents to generate a list of possibilities. We then spent considerable time searching for the right one, at least one which could meet our needs and fit our budget. Finally, a year ago we bought the apartment, which has since been remodelled. So, now we need to sell the house. How do we find a buyer willing to pay the price we are asking? All of the time and effort spent by both sides of such a transaction represents search and matching frictions.

This has been taught in business schools for ages and has always been a daily reality for practitioners: How do sellers find customers and how do customers find sellers? It is treated in any textbook on marketing, sales and purchasing. As the earlier quote said, marketing theory and education have been concerned with this for 100 years.

Friction and search in markets is what marketing is about. Unfortunately, this was unknown to the Nobel Committee which in 2010 reinvents the wheel by awarding the 'inventors' with the Nobel Prize for their 'discovery'. If you are critical you could say that the awarded 'discovery of search frictions in markets' is unashamed plagiarism. But the truth is more likely ignorance stained by an arrogant attitude towards business and management disciplines as not being scientific. Microeconomics claims it is science despite the fact that it only defines an exception and cannot

(Continued)

¹⁷The Nobel Prize as a potential quality model for scientific research in business and management is further discussed in Chapter 11.

(Continued)

be generalized. But it is rigorous and mathematical – ‘pure theory’ – meaning that it has taken out most of the disturbing complexity of reality in order to make it fit the language of mathematics.

A benevolent conclusion is that the laureates have applied their ‘discovery’ to the labour market and its specific context. Based on empirical data – I suspect it is mainly macro statistics and not case study research and other ‘softer’ data – they have designed a model for politicians and governments to use for labour policy planning and activities that reduce labour market frictions. I have not evaluated their model in the labour policy application and its predictive and planning qualities. If the model works in practice I do not know. But that is not what they got it for, according to the Prize motivation. The Prize could certainly not be justified by discovering a general dimension of markets that has been lived by practitioners for 1,000s of years and has been in the core of marketing practice and research for ages and can be read about in any undergraduate textbook on marketing.

I felt frustrated and left the lecture.

It so happened that I wrote this section on 10 December 2015, the very day the 2015 laureates received their Prizes. The one for Economic Sciences went to Scot Angus Deaton ‘for his analysis of consumption, poverty, and welfare’. He found that the macro picture of consumers was too simplistic as based on traditional microeconomic assumptions. Instead, it was necessary to have empirical data on the actual behaviour of consumers. From that he built a new theory of consumers. I have not had time to investigate his work in depth but after some checks I find that although he has written in *The Journal of Consumer Behavior*, the leading journal in the field, he does not seem to be noted in the comprehensive research on consumers emanating from marketing, nor to have any references to it. And I do not find him in textbooks on consumer behaviour. I suspect that he collected his data primarily from surveys, panels and statistics, and not cases. Deaton has taken a step forward but it shows the big gap between several researchers, depending on what discipline they belong to and the way their researchscape encapsulates them, thus keeping down the productivity of science.

Persona Factors and Researchscapes

So far we have dealt with the conceptual and institutional features of business and management in impersonal terms. But this is not enough if we want to understand how knowledge emerges and is used. A business strategy is selected and implemented by people whose personalities and idiosyncrasies affect its content and outcome. It’s the same in academic research. After having

completed my PhD in 1977, I made the following note: 'Doing scientific research is 50% intellectual and 50% social.'

The persona of a researcher can be anything from too modest to be noticed to megalomaniac. In that sense scientists are no different from other people. The best-known professors are not necessarily the best contributors to knowledge enhancement. If you think you have made a contribution you have to market it and make it visible or it will not get noticed. Some go for the big speaker's fees and get hailed and highly ranked. I meet all of these types in academic research.

The term *persona factor* will be used for *individual* personalities and their behaviour but also includes the context in which a person functions, the *group persona* of an organization with its atmosphere, culture and values. A term from psychology is *group think* which is a nicer term for 'gang mentality'. Vedic philosophy talks about *collective consciousness* which is different from *individual consciousness*. If the collective consciousness is not mature enough to receive new knowledge – such as when it was proposed that the earth is round and not flat – the individual risks being harassed. *System* is another concept. We live in political and social systems which we cannot change as individuals, at least not in the short run, and to do it over a longer period we must be strong, smart, daring and persistent. We know as individuals that something is not right but if we don't comply we get punished. It is a sensitive issue in research; it's even taboo. On a political level, people eventually start revolutions against dictatorships and we get informed about them through the news every day.

There are numerous theories and guidelines about leadership; someone found over 1,500! Cases of successful leaders are presented in the business press and some such leaders are held up as role models. But leadership is contextual. One type of leader may fit an entrepreneurial growth stage, another a consolidation stage. We can learn from quantum physics that you can't know, measure or use anything unless you address it within its context. At one stage a skilled engineer may be needed, at another stage a skilled marketer, and in a third stage a financial wizard. A leader may not find a working chemistry with one organization while in another he/she fits in beautifully. Innovative and entrepreneurial leaders constantly have to go against the mainstream which raises stress and there is no wonder that many of them are difficult to work with; they are often unpleasant and offensive. Some employees can work constructively with them but many cannot.

These were examples to show that everything occurs in a context, in a specific environment and under specific circumstances. A general concept like strategy cannot be understood unless you know in what context the strategy is designed and meant to work. It is dangerous to reduce academic research to knowledge that is strictly conceptual and methodological – 'scientific' – and to overgeneralize it. We can't disregard the specifics of the situation at hand, which becomes blatantly obvious when we go to the next step: implementation of knowledge.

In *Absolut: Biography of a bottle*, Carl Hamilton (2000) tells the story of the launch of the brand Absolut Vodka (Box 2.2). His interest in people and relationships, to a large extent, explains why certain ideas emerged, why certain decisions were taken and how implementation took place. The persona factor adds to complexity but also to the validity and relevance of research.

Box 2.2 Absolut Persona

When the Swedish advertising wizard Gunnar Broman arrived at Madison Avenue, New York, to negotiate with a potential US partner agency for the launch of Absolut Vodka, he was first introduced to the people in the meeting room (Hamilton, 2000, p. 20):

Broman burst into hearty laughter. He laughed with joy. He laughed his way through the creative process.

– I come from the land of the thirsty, he solemnly declared.

And then he laughed and the Americans laughed, too. It always started with the laugh. Broman laughed, and soon everybody was laughing together. The laughter meant that they were picking up the message.

I have worked with Broman. When I read this I said to myself: This is Gunnar in a nutshell. That's the way he was. The author also characterizes other people, not always in flattering terms but most likely correctly. For example, when Lars Lindmark, an impatient, high-ranking civil servant who was appointed Director General of the Swedish Liquor Monopoly, arrived at his new office his reaction is described as follows (p. 84):

Lindmark could not believe it. It was as stuffy as an English gentlemen's club ... He threw the three directors off the board. He just didn't like them. The administrative director was mean, the technical director hostile, and he thought the financial director was just plain stupid.

This may be perceived as fiction, but it isn't. Not unexpectedly the Liquor Monopoly did not like the description. Was the author too open? Had he embarrassed people? If he had withheld unpleasant information in the consideration of people, would the case still have validity? Is he unethical? He praises some of the actors in the case for their talents but he also shows their weaknesses and idiosyncrasies. It is an effort to be frank both about the good and the bad. This is the way life is, we all know that.

At the time the book was published, Hamilton was a PhD student and faculty member of the Stockholm School of Economics. The Liquor Monopoly complained to the president of the school and the author was expelled. This may not be encouraging for an academic in his/her career but it is a risk you take if you go beyond convention. For your consolation, Hamilton has been doing very well since his dismissal.

The excerpts from the Absolut case concern the persona of a business setting as studied by an academic researcher. The persona factor is also a driver of how research is done and what comes out of it. Many researchers are true scholars dedicated to science and if they are lucky they meet likeminded colleagues and form a productive group persona. I refer to the group persona of a research environment as the *researchscape*. The Latin word *persona* originally meant 'mask', a role that a person is expected to play which may be different from the way he/she really is. In business we don't talk about a mask but of image and brand, which refer to how you are perceived by others. If you comply with the values and behaviour of the group persona, you become a *persona grata*, an acceptable person; if you deviate you can become an outlaw, a *persona non grata*.

But behind a scientific front, real life offers a spectrum of human virtues and frailties. Academic intrigues and the bullying of colleagues are as alive today as they have always been; ask anyone who has been through a university career. The demand on scholars to advance science creates an atmosphere of competition and some of those who are less successful get stuck in frustrated behaviour. Strong commitment to a cause can give rise to conflict which could be a constructive driver but can also become a destructive blockage to progress. Having worked both in business and academia, I know that a dark side of the persona can exist everywhere, but I have found it more frequently in academic institutions. This was the reason why I stayed in both business and academia and for a long time rejected offers for a full chair.

Although an intellectual achievement is closely knit to the persona of the researcher, one must never evaluate a contribution based on the perceived persona image, but on the knowledge-enhancing content. For a researcher to become known it is rarely enough to make useful contributions; it is also necessary to build a scientific persona brand. There is an old saying that 'a good product sells itself' but it is not as simple as that. In science and research it works the same way as the branding of soda drinks and perfumes. If a researchscape is prestigious, its brand spills over to the individual researcher, and a single professor with a high profile lends fame to the whole researchscape.

I am amazed to see how much some researchscapes put into defending and promoting their research even when it is outdated. They consciously do not cite the new, they repeat their old references forever and they sometimes seem to do this in alliance with journal editors, even those of top journals. These people have lost their scholarly mind but they may very well uphold an image of being scholars.

It is always important not to confuse an intellectual achievement with the person behind it. Einstein is probably the premier brand in science; he is even a household name although few of us understand his theory of relativity. Business and management also have their premier brands. The problem with a brand image is that sometimes it is true and corresponds to the content, sometimes the

brand is high but the content is low and sometimes the brand is low but the content is high. A 'top university' or 'top journal' should of course mean top in content but that is not necessarily so. Brands are marketed and reputations sometimes earned at one time, but the content may since have deteriorated though the image is retained. This creates a dilemma for the serious scholar: to get known and get a message and discovery spread, he/she may have to make a compromise between profiting from the image and still sticking to the content – but it is easy to start to believe in one's image and lose sight of the true content.

Researchers are taught to be critical of whatever new thing they encounter. By many researchers, and sometimes reflecting the general spirit in research-scapes, this is perceived as judging everything new negatively, with the purpose of faultfinding. It fosters *destructive criticism*, finding joy in killing off everything that deviates from the mainstream, even being sarcastic and arrogant. You can frequently see this in anonymous reviews where the critic does not have to face the 'accused'. It's risk-free and non-committing. Criticism can be a blow to the one exposed to it, even if it is unjustified, because it can lead to a loss of motivation and a constant feeling of inferiority. True scholarly criticism is *constructive* and directed at encouraging the 'victim' to make improvements. It then works as an impetus.

Despite the 'calling' to devote their life to knowledge development, education and high ethical standards, scientists are probably no more or less moral and dedicated than any other human beings. They, too, are affected by the 7 deadly sins and the counteracting 7 virtues (in brackets): hubris/overbearing pride (humility), envy (satisfaction), wrath (patience), indifference/laziness (diligence), greed (generosity), gluttony (abstinence) and lust (chastity). We can apply the both/and rather than either/or mode to each of these 'opposites' and recognize that it is the tension between them that makes life vibrate. For example, a dash of greed is necessary to make a profit but coupled with generosity it gives balance to life, and too much humility can be just as counterproductive as too much pride.

Accepting that the alleged objectivity of scientific research is influenced by the persona factor widens the understanding of the reality of science. Methods books promote the *scientific man*, the ideal scientist and scholar who is solely dedicated to science. In economics there is the archetype of the *economic man* and in management the *administrative man*, both representing absolute rationality. These extremes exist but they are rare and may even stand out as human parodies.

To understand how research works in practice and the influence of the persona factor, we can benefit from a branch of research called *the sociology of science*.¹⁸ Its topic is the behaviour of scientists in real life and how this behaviour

¹⁸See Merton, 1979.

may affect the productivity and quality of research. It is rarely mentioned in methodology books.

Improving established theory is one of the tasks of science. It is too often misunderstood and you can become accused of hubris and disrespect. It is therefore extremely important to distinguish between the person and the value of that person's theory. If an idea is found to be wrong or invalid, it does not by default imply disrespect for its originator or those who use it. They may have done a great job and provided a platform for future researchers. 'A diamond is forever' has been voted the most successful advertising slogan of the past 100 years but few theories are diamonds; most have a short life unless they are coupled to a heart-lung machine.

Great engineers, great doctors, great chefs and great fashion designers have *passion*. So do great researchers, be they in business and management, cosmology or mathematics. Sadly enough most academics are mainstream followers, doing and saying the 'right' thing, using the 'right' research techniques and publishing in the 'right' journals. Although innovation is the buzzword of the 2000s, they don't challenge the establishment for the risk of being called unscientific and blow their chances of promotion. They play along and become *bureaucratic researchers* – but we need *entrepreneurial researchers* who are the true scholars.

Aristotle talked about *ethos*, *pathos* and *logos* as the qualities of excellent argumentation. Logos – logical study – is rational and taught to researchers. Ethos – being ethical and credible – is more problematic; the ethics of science is less understood. Finally, pathos – being passionate – is rare. You don't find passion in the methods literature but you can find it in biographies, novels and movies. I have only found one book written by scholars that relates passion to research: *Passionate Sociology*.¹⁹ They say that scientific knowledge is presented as 'a product of the mind rather than the heart, body or soul ... [a] desire to rise above the partiality of the knower's embodied form, preferring to experience the world as a set of fixed and external objects', and continue: 'Despite the common use of the term "reflexive", sociology normally refuses to analyse its own practices sociologically. It is happier to view itself in terms of the history of ideas.' But just like business and management, sociology is concerned with everyday practices. And how can a discipline describe and interpret life and reality when it steps out of life and reality?

They further say that 'Sociology, history and anthropology have all been traditionally motivated by horror of disorder ... Although analyses promising a complete order are often prized, they are a megalomaniac's fantasy ... It is not that the former have *found* a complete or objective point of view, it is that they hide their ignorance and the specificity of their knowing.'

¹⁹Game & Metcalf, 1996; quotations from pp. 4, 38, 85 and 86.

We seem to be possessed by finding security in a world that is inherently insecure and look for:

enlightened knowledge that explains (away) wonder, that demystifies the dark space of myth, that replaces emotion with intellect ... [but] ... Scientific rigour cannot offer direct access to the real or eliminate the distance between self and other, but it can help us understand how we create what we feel we know.

The more I have experienced the academic and research world, the more the persona factor and the culture of researchscapes have stood out in influencing the scientific aspects. I see how journals and conferences are besieged by certain cliques. Their agenda is to defend the past and their own contributions. Elaborate diplomatic tricks are used to avoid confrontation and infiltrate and dilute the new discoveries. There is little confrontation in articles – silence is the most used weapon. You simply avoid citing someone. I don't know how many times I have heard completely meaningless presentations at conferences but not said anything. Why not? Mainly because the presenters may not be able to take it and may start defending themselves; you do not want to confront the presenter in front of an audience and you risk getting hostility back from others.

Journals and books set up priority research lists based on several co-authors and citations from others; sometimes others have also been interviewed. But if you know the field you can see how biased it can be. I am not sure the editor-in-chief always understands what he/she is doing. A rather recent trick is to say that 'we are one global community'. We are not – if we want to advance research. We are *networks of numerous* communities and today we can more easily build our own global networks. New discoveries rarely pop up in organized groups. They come from individuals or a few close buddies who gradually gather a core group and a critical mass around them. It is not democratic; it can't be decided by voting among peers.

Be still when you have nothing to say; when genuine passion moves you, say what you've got to say, and say it hot. (D.H. Lawrence (1885–1930), novelist, best known as the author of *Lady Chatterley's Lover*)