

# The Resonance of the Past in the Present: The Possibility of Causal Inferences from Historical Research

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**Abstract** This essay presents an investigation into the possibility of inference of causality from historical research, starting from the perception that the encounter of the causal explanation of an event is among the main motivations of many researchers. It begins with an explanatory analysis of cause, determinism and principle of causality, followed by history and historical method. It uses bibliographic data and positions itself as an interaction of social practice. The analysis was made from dialogical debates on content and theoretical triangulations, with the application of a dialectical model, based on positivism and interpretivism. The work seeks to bring to the scientific community an analysis on the subject.

**Keywords:** *cause, causality, determinism, principle of causality, historical research*

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## 1. Introduction

The present work wishes to answer a curiosity about the possibility of inferring causality when using the method and historical theory. History, as a rule, has a narrative, descriptive character. In addition, it is permeated by the mediation of the researcher, who interprets the documents and data that he has collected. But would the act of interpreting itself be able to dismiss the causality of systematically conducted historical research? In turn, the cause is linked to just using generalizable, empirically observable and replicable facts? And considering this question about the experimental character of the cause, will it be possible to conduct historical research linked to these presuppositions?

In order to clarify these doubts, the present article sought knowledge in philosophical, scientific and also in organizational studies. The article was designed with a vision to a better understanding of the findings, dividing it into an introduction, theoretical reference, methodology, arguments and analysis and conclusions. In the first part the initial idea is presented. In the theoretical reference are placed the central ideas obtained from the literature found on the subject, which per passed general areas such as philosophy, sociology, education and organizational studies and the methodology employed in them. In the arguments and analysis the answer about the research problem is developed, not without situating the theme ontologically and epistemologically, theoretically and philosophically. Finally, the conclusions are presented,

when, in fact, the research problem is answered and further research on the subject is recommended.

## 2. Theoretical Framework

The theoretical framework involving this research has its beginning in the positioning of the researcher in relation to reality and to knowledge. Thus, starts from the ontological and epistemological dimensions that surround the work. Ontology, according to Grix [1] is "the image of the social reality upon which a theory is based" ([1], p.177). Thus, according to the author, ontology is positioned within the perspectives of objectivism and constructivism, where the first "affirms that social phenomena and their meanings exist independently of social actors" ([2], P.16), and the latter "States that social phenomena and their meanings are continually being concluded by social actors. It implies that social phenomena and categories are not only produced through social interaction, but are in constant state of review ([2], pp. 18). As the construction of social phenomena and their meanings depend, in this context, on social actors, it becomes possible to affirm that such dependence refers to the subjectivity of each actor, so that in the sequence of this work the constructivist perspective will be addressed as subjectivism, to better position the role of each social actor.

Still in Grix [1], epistemology is concerned with the theory of knowledge and with the possible ways of obtaining knowledge from social reality. It focuses on the process of collecting knowledge and is positioned in the

perspectives of positivism and interpretivism. According to Bryman [2] the first "advocates the application of natural science methods to study social reality and beyond" ([2], p.12), and the second is based "on the view that a strategy is necessary in order to respect the differences between people and objects of the natural sciences and, therefore, requires the social scientist to understand the subjective meaning of social action" ([2], p.13).

In the preamble of the argumentative discussions about the object of study of this work, emerges the debate about the relation between events or events in a temporal continuum. The different positioning in the temporal continuum presupposes occurrences at different times or periods, referring the study to the possibility of historical research. However, the heart of this discussion is the cause between events to happen, hence the causality between events. It is necessary, then, to outline similar positions surrounding the cause, for a correct positioning of the object of study. The first of these positions is the very cause, where the concept of Popper [3] that permeates the deduction of the utterance will be approached, therefore with a deductive character from the linguistic perspective. The cause, in the context of this work, will be treated as motivation or reason between two or more events. The second position is the determinism, which can easily be confused with cause. Determinism, of inductive nature, will be treated from the point of view of Bastos Filho [4] who sees it more as a predictive capacity rather than a motivating one. Such point of view makes possible the characterization of determinism as a reductionism of causality, since its amplitude is limited to a capacity to predict. Finally, the third position is that of the principle of causality, which offers a synthesis for the dialectical question of causal deduction and deterministic induction. According to Popper [3] and Hessen [5] events have causes, but Popper [3] states that events can be deductively predicted, broadening the concept a little. Bastos Filho [6] also enters this sphere, bringing the Leibniz principle of sufficient reason, associating it with the motivation between events, and therefore causality, taking it to a position similar to the principle of causality.

Setting the object of study in the field, the work follows on to the possibilities of causal inference through historical research. The first possibility is that of linguistics, as an instrument for the analysis of the nexus between events, where Coffin [7] suggests that causality can be expressed by "causal expressions", the cause being a central concept in history. Then, in an organizational context, Nascimento et al [8] brings an interpretative approach where the historical fact is constructed by the historian, in the present. Ferreira [9] raises positions for historical research and also for the reconstruction of reality through historical trajectory. Gomes and Santana [4] add with the inclusion of oral history as a possibility to reveal reality.

Pessoa Jr [10] also addresses causality, however from a philosophical perspective. The author presents causes in sufficient sets, represented by the acronym INUS (Insufficient, Necessary, Unnecessary, Sufficient), revealing that there are more than one set of conditions to produce an effect, contradicting the positivist view that a cause is a necessary and sufficient condition. It also presents a

typology of philosophical conceptions of causality, composed of causality as a substantial relation, in which causality involves a real (or substantial) relation between two events, within a rational dimension; causality as regularity, in which "causation" would be a name given to phenomena of constant conjunction or correlation, which express a regularity or a law" (p.7), within an empiricist dimension; counterfactual causation, which is "a way of characterizing causation in terms of 'counterfactual conditionals', that is, from a situation that did not occur" (p.8), also within an empiricist dimension; and, causation by manipulation that occurs in situations where two classes of events are correlated and for the identification of a common cause control is made in one of the events and observed as the other is affected. Such a procedure is taken as a definition of causation. Finally, the author deals with probabilistic causation, in which the causal relation is conceived by a probabilistic relation, adapted to the conceptions of the typology presented, and closes with causal models of real situations, developed from the ideas exposed by him.

Maar [11], in his work on causal explanation and history, presents the summary of the trajectory of the idea of causality in the writing of history from the metaphysical conceptions, through the neopositivist to the analytic ones. It discusses a neopositivist approach to history, in which historians should seek out causal laws, even probabilistic ones, corroborating with the thinking that the nomological-deductive model is the only reliable source of causal explanations and scientific knowledge. He argues that the writing of history also uses causal relations, but with non-nomological types of causal explanations. The author advocates that

... Instead of rejecting causality, historians should reject only the use of laws, since the nature of their explanations are descriptions of particular events in a rational but not scientific way. The presence of causality in historical texts is the only way to keep history on the path of rational activity and seeks to confirm theories in empirical evidence (Abstract).

### 3. Methodological Procedures

This work is a product of a priori thinking of its authors. The idea arose from a debate on historical research, where the question was raised regarding the possibility of causal inference from its application. Since it is a theoretical essay, it positions itself as an interaction within a social practice, where it seeks to bring to the scientific community the analysis developed on its theme. Its object of study is the causal inferences within the method of historical research, investigating the possibility of causal inference from historical research. The data collection was done eminently from bibliographical surveys and the analysis from dialogical debates about content and theoretical triangulations. It uses a dialectical model and its epistemological basis is positivism and interpretivism. The argument is presented within the adopted epistemological aspects and uses the contextualization from the theoretical reference for the development of the analysis, for which the object of study was fragmented into two great parts: first, the idea of causality, presented

as a deductive process, and also treated as motivation or reasons between two or more events. Causality was confronted with determinism and synthesized with the principle of causality. The second, the context of history, in which historical research was chosen as a method for analysis. It is understood that it is possible to study history from other methods, but one cannot use historical research without history.

## 4. Argument and Analysis

### 4.1. Ontology, Epistemology and Methodology

Before entering into the question that gave life to the present work, it is important to distinguish the ontological assumptions from the epistemological ones, and to differentiate them from what comes to be methodology and method. In an attempt to support research in the social sciences, Morgan and Smircich [12] have stated that as regards the conception of reality and about human nature, schools of thought extend between the objective and subjective perspectives, being arranged in a continuum [13]. In this continuum, the approaches range from the subjectivist to the objective in the following categorization [12]: conception of reality as: (1) projection of the human imagination, (2) construction; (3) symbolic discourse; (4) a contextual field of information; (5) concrete process; and (6) concrete structure. With regards to conceptions about human nature, the authors drew up another continuum based on the visions of man as: (1) a transcendental being; (2) creator of his reality; (3) social actor; (4) information processors; (5) adaptive agents; and (6) response mechanisms.

The ontological assumptions presented by Morgan and Smircich [12] vary from the conception that reality is a projection of individual consciousness, to the conception that it is external, concrete and real, as well as the natural world. In this continuum, there are theories that admit the interaction between man and reality. Regarding human nature, from one end to the other, it is admitted that man is the determining "element" in the change of the outer world (subjectivism) or that man acts according to established rules (objectivism). In this continuum there are theories that admit that man acts according to the meanings that, by interpretative processes, attributes to the situations and others that understand that reality is independent from the performance of man, being external to him and amenable to reproduction in similar environmental conditions.

Considering the contributions of Morgan and Smircich [12] and taking into account the concept of ontology by Grix [1], it is possible to affirm that between the forms that social reality is understood there are objectivist positions, that defend that reality is independent of the subject, and subjectivist positions, which understand that subjects, collectively, construct reality through a continuous process.

To understand this reality, we adopt epistemologies that are coherent with the ontology to which the researcher aligns. There are epistemologies that are equally more objectivistic and others more subjectivist. The most common example of objectivist epistemology is positivism. As for the subjectivist researches, of an interpretative

nature the examples are in qualitative research, in which phenomenology, symbolic interactionism and constructivism are epistemologies that can be cited for exemplification [14].

Since epistemologies are a way of conducting studies about reality, it is necessary to adopt a methodology, that is, a way of thinking about social reality, studying it [15]. In carrying out the activities necessary to the search for knowledge, methods must be employed, which are procedures and techniques designed to collect and analyze data [15].

Historiography, according to Ferreira [9], states that history received a theoretical-methodological reformulation in the twentieth century, failing to be seen under the functionalist and progressive aspect, and beginning to be conceived by more interpretative aspects, in which history and culture together are elements of comprehension of reality. The method of the use of documents, for example, underwent transformations; inasmuch did not fail to consider the presence of acts of will and elements of power in the production or not of these means of transmission of history [8]. History is thus both theory and methodology used in present times for the understanding and explanation of reality. This will be better addressed later.

### 4.2. Cause, Determinism and Principle of Causality

The encounter of causality, or the causal explanation of an event, is among the main motivations of many researchers, particularly those who have in the natural sciences their research strand, within objectivist ontology and a positivist epistemology. However, within the social sciences such condition is more susceptible to variations, making events less linear than those arising from the natural sciences. For some this may lead to the impossibility of talking about the inference of causality in historical research, although for others it is not quite so.

Let us take epistemological plurality as a starting point. It is true that events in the social sciences can be analyzed also from positivism. However, there is a great incremental epistemological myriad that allows countless other possibilities of analysis of events. Such epistemologies do not necessarily conform to the concept of causality, as conceived in the natural sciences, especially in chronologically ordered events. If one event happened before another does not mean that it is the cause of the last, but it may have determined it. The cause may remain in a mediate and not immediate instance [5], making necessary the distinction between cause, determinism and the very principle of causality.

In a rapid revisit, the cause, or the offering of a causal explanation of an event, "means to deduce a statement which describes it, using, as premises of deduction, one or more universal laws, combined with certain singular statements, the initial conditions" ([3], p.53). However the cause is not necessarily the explanation of the relationship between successive events in a temporal continuum. As stated, the cause, or in the broad sense presented, causal explanation, or even the causal nexus, may be an inference underlying the motives of events, even in a volitional instance, but not necessarily its origin.

The consequence of one event chronologically subsequent to another can be a deterministic act and not of causal consequence. Here comes our second conceptual revisit: determinism. If on one hand the cause assumes a deductive character from a linguistic, as a rule, descriptive, determinism orbits in a sphere dominated by an inductive world, in which "the past is equal to the future and in which there is nothing new and creative in the light of the sun" ([6], p.3304-2). Thus, determinism is more related to predictability than to motivation, as put by Popper on scientific determinism [6]. Therefore, we conclude that determinism is a reductionist concept of cause, or more specifically of causality, precisely because its instance is circumspect to the capacity to predict, which is also limited. Such statement is corroborated by Bastos Filho himself, when he states that "the most important of Popper's thesis is that all past events together with all laws of nature do not imply, by the very impossibility of the same principle, the future. The past is already given and the future is essentially open. That is why one cannot foresee everything" ([6], p. 3304-3), suggesting a supposed rise of the cause over determination.

However, arises in this debate another important concept, aired on the spectrum of determinism: the principle of causality, object of our third brief revisits. To a certain extent, a dialectical confrontation is here compounded by the perspectives of causal deduction and deterministic induction, each in its own domain. The principle of causality harmonizes perspectives by offering a synthesis that supports both approaches. Popper states that the principle of causality "is the assertion that any and every event can be causally explained - that it can be deductively predicted" ([3], 54). Hessen corroborates when he affirms that "every change, every event has a cause" ([5], p.151). Thus, we can assume that the principle of causality is the concept that best governs the relation between events in a temporal continuum. But the restlessness persists. Even with the principle of causality, is the causal inference between chronologically arranged events assured? We can assume that the causal nexus between these events is established. We understand that it is necessary to go a little further than the argument presented so far. At this point, history gains body as the field of study of the

phenomenon understood as the relation between two (or more) events in a temporal continuum. However, there are intermediate steps.

One can, as demonstrated, establish a relation of causality or determinism between events arranged in time. The existence of the relationship itself is evidence of the nexus between events. Thus, it is possible to infer that in the presence of nexus, whatever it is, the relation is necessary, outlining the principle of causality rescued in Leibniz. But in order to get there, we need to go through the principle of sufficient reason of the author, according to which "nothing exists without there being sufficient reason why this should be so and not in any other way" ([6], 3304). By bringing reason to the linguistic context, we can infer that its meaning is directly associated with motivation. In this sense, inference expands to the field of causality, allowing the assertion that Leibniz's principle of sufficient reason is also a principle of causality, agreeing with Bastos Filho. The necessary relation in question is therefore reached by the context of motivation (and therefore of reason) making possible the assertion that, within the Leibnizian perspective, the principle of causality deals with the nexus between events from the necessary causes for it to occur.

But for this to be so, the epistemological assumptions adopted must be other than those of neopositivism. It is that in the causality considered by analytic there is room for the action of the subject, who is able to interfere in reality by his acts of will. The cause, from this point of view, is not exhaustive, covering the possibility of meeting other motives that generate the phenomenon studied. However, it is a sufficient cause [16], since it is one of the reasons that generated the phenomenon studied. It is possible to synthesize what has been exposed so far in Table 1.

If there is, therefore, an experimental causality, proper to the natural sciences, dedicated to experimentation and the generation of laws, and, on the other hand, if there is an analytical causality, which is satisfied with the presentation of motives, which are sufficient for explanation of events, although not necessarily unique, it becomes curious to inquire how the historical method deals with these notions of causality. It is on this issue that we will look at from now on.

Table 1. Analytical Synthesis

Analysis	Experimental causality	Analytical Causality
Ontology	Objectivist	Tending to be subjectivist
Epistemology	Positivist	Interpretivist
Finality	Generate laws, create generalizations	Finding motives and explanations in exhausting the reasons that generated the studied phenomenon
Analysis method	Deductive	Inductive
What is studied	Explanation, for example, of history through social structure or economic organization	The facts in general. Cause here is synonymous with reason and motivation.

Source: Generated by the authors from the work of MAAR (2008).

### 4.3. History and the Historical Method

It is true that history is important in the analysis of events in the temporal continuum. The historical method of analysis of the phenomena object of study brings with it a series of characteristics and techniques that seek to attend to the researches made based on its assumptions. Considering that there is a menu of options of methods suitable for analysis of the social sciences, it is important to ask and pursue answers to the following questions:

- What are the main characteristics of the historical method?
- Is the historical method a scientific method?
- Is it possible to adopt a positivist epistemology in the adoption of the historical method?
- Is it possible to infer causality through the historical method? If so, how?

Before trying to answer these questions it is necessary to go through the historical method and its characteristics. According to Nascimento et al ([8]: 260) the story can be seen from an account that brings it closer to literature and particularly the essay genre, to those who see it as a science of rigor, close to a positive literature, making use of research techniques that should ensure, to the extent possible, empirical evidence.

Nascimento et al. [8] also clarify that history transcended the limits of the public and the political, encompassing, for example, the history of culture, the arts, the economy, women, having entered into private life. In terms of bases of support, they also clarify that history has had from theological and metaphysical foundations to positivist bases. In the former, the "explanation" for historical events was based on divine, immaterial elements, alien to the physical aspect and to the five human senses, entering the field of the individual's belief. The positivist character of history had its foundations in the Enlightenment and in the concept of progress that this episteme adopted [8].

But the emergence of the social sciences also stirred the epistemological basis of historiography [8]. Has stood out the emergence of the *Ecole des Annales* in the nineteenth century, which endeavored to affirm the scientific character of historiography, adopted a positivist epistemology, and made, paradoxically, relevant contributions to the subjectivist epistemology, since its students gave a differentiated treatment to documents, even the inexistence of these can be interpreted as a way of legitimizing and perpetuating power [8]. This school has come to view history as something dominated by the present, because it asserts that historical events always relate to specific contemporary needs and situations [8].

Attempting to overcome the positivist universalism, historical and social researchers got closer, and historical-cultural relativism has gained space, adopting more subjectivist conceptions, in which different cultures and different historical moments bring different meanings and worldviews [8]. Interpretive conceptions have taken the postmodern history, which is characterized by the presence of the researcher's concerns and inquiries regarding the present problems, which history will "prove" [8]. Postmodern history is dedicated to microhistory, which studies shorter interpretive cycles.

Within the theory rescued so far, one can see that it is possible to use the historical method with both positivist

and interpretative premises. In fact, throughout the "history of history" this actually occurred. But after the postmodern period, with the insertion of the subject and the implications of its acts of will, power relations, and contextual analysis, would the question of causality in research based on the historical method have changed? Does the presence of the subject in the process of explaining the present by the historical rescue and the loosening of positivist ties in research have removed the scientific character of the historical method? Has causality in historiography ever ceased to exist when the historian enters the research cycle? The previous question is the motive of this work and we will dedicate ourselves to it from that moment.

### 4.4. Causality in Historiography and Its Epistemological Implications

In postmodernity, linguistics represents a valuable instrument for analyzing the nexus between events. Addressing the use of the historical method in scientific studies Coffin [7] presents a strong argumentation as to how causality can be expressed through written history. According to the author, linguistic analysis provides the possibility for the use of causal expressions that could explain historical events, suggesting that the cause is a central historical concept. It continues with the use of textual genres, which are the way texts are structured, so they can tell a story, pass instructions, or explain past events. It presents a genre typology composed of narrative genres, which explains the way in which events occurred with causal centrality, and argumentative genres, which differently do not treat causality as a "primary organizational device" ([7], 269). It follows with a lexical categorization of grammar, bringing orthographic combinations that relate events and arrives at causal patterns and explanations. However, the report seems to establish a negotiation of causal frameworks in which causality between events is deduced. Therefore, the context created is of theoretical and not necessarily experimental or deductive causality.

Nascimento et al [8] brings an approach where historical research is a way of perceiving reality and also that the past has a resonance in the present, within an organizational and social sciences scenario, in which a historical fact is constructed in the present by the historian. Thus, history is seen as an interpretive science and historical research in administration receives contributions from economics, sociology, and history itself. As the authors' approach is interpretative, a possible causal nexus would fall in a subjectivist context, with the possibility of non-presentation of causal inferences remaining.

Ferreira [9] brings a contribution to the use of historical research in the construction of knowledge about management and organization in the country, listing objectivist and subjectivist perspectives in organizational research in which history represents a theoretical-analytical assumption. The author presents three positions assumed in historical research: the supplementary, to reinforce an argument; the integrationist, which enriches theorizing, and; the reorientationist, in which there is an epistemological redefinition of the field of research. It also passes through the reconstruction of reality through the scrutiny of

historical trajectory. However, just as Nascimento et al [8] and Coffin [7], the theoretical assumption of Ferreira [9] represents a subjectivist approach, in which causal inferences are not evidenced in a deductive way.

Gomes and Santana [4] present the possibility of oral history in Administration, which has great potential for providing a multidisciplinary view of organizational reality. According to the authors, in-depth field interviews raise questions about "experiences, visions, interpretations, memories, opinions, understanding about a subject, thoughts, ideas, emotions, feelings, perceptions, behavior, practices, actions, activities, interactions, beliefs, commitments, products, relationships, etc." ([4], p.14) of the interviewees, which would be phenomena to unveil organizational reality and are in line with oral history. Even with these important contributions, such surveys represent a position of respondents to interview stimuli. These positions can provide large amounts of information to build organizational reality, but again fall back on subjectivity.

It seems to us that after the postmodern conception of historiography, in which the figure of the historian is assumed to play an important role while mediating the explanations obtained in history for contemporary phenomena, there is no longer any way to depart from subjectivist implications in the method history and history itself. But is it possible to affirm causality in historiography, understanding that the concept of causality is plastic and is not only aligned with the nomological-deductive conception [11], experimental and positivist episteme. And there would be no absurdity; since there is no doubt that the lenses of the natural sciences do not serve as gloves for research in the social sciences.

Thus, theoretic causality, which explains motives, which gives reasons [11], but which is not a necessary cause but a sufficient cause [16], seems to be the kind of causality possible, if one adopts interpretative epistemologies in the application of historical method.

On the other hand, considering that the positivist bases still give the tone of the research in general, and knowing that there was time in which they guided the "historiographical making", we believe that the answer is also affirmative, if historiography is guided by this epistemology. What seems to us possible to affirm still, and in a certain contradiction to the previous idea, is the difficulty in having a purely positivist episteme and to obtain a necessarily experimental causality in postmodern historiography, since there will always be between the phenomenon researched and the data analyzed the figure of the historian, human person, who interprets the facts and who does so in the light of his moral, ethical, and social assumptions, bringing contemporaneity to historiography and portraying their findings in the light of their frontiers of knowledge.

## 5. Final Considerations

In order to respond to a curiosity born of the dialogue, the present work sought a response to the question about the (im) possibility of causal inference through the use of historical research. For that, ontological and epistemological assumptions that guide the application of the method and

also the historical theory were revisited, since it is not possible to dissociate the method of this method. Also starting from the need to know the limits and the extension of the term causality, researches have been carried out about this is to be.

It was concluded that it was impossible to obtain a dichotomous, excluding response. We have come to the conclusion that causality has a plastic concept, depending on the ontological and epistemological assumptions with which it is conceived and verified. Thus, under an objectivist view guided by positivism, it is possible to obtain causality through the use of the historical method which, here, will be deductive, of an experimental character. Causality from the positivist perspective is necessary, that is, unassailable, sine qua non condition. Already under the interpretative orientation, on a more subjectivist ontology, causality is conceived as sufficient, constituting itself as a synonym of motive or reason. This causality may be sufficient, though not exhaustive, as regards the identification of skillful elements to collaborate with the occurrence of the phenomenon. But the presence of the element identified as motivating is sufficient to the causality pursued in the method of historical research.

Although not dichotomous, the answer is affirmative, but the clarification about the type of causality, depending on the ontological and epistemological assumptions with which the research is conducted, varies. Even though we have understood this, we cannot fail to observe the difficulty that we understand present in affirming experimental causality in historical research in present days. It is that, after the changes brought to the theory and the historical method in the postmodern era, they invariably inserted the subject - the researcher - in the research process guided by this theory and / or by this methodology. Thus, however much the research looks positivist, the researcher's interpretation cannot be dismissed, since this methodology is inserted among the qualitative ones, of which interpretation is inexhaustible. In this sense we recommend that this field be a field of future studies, since the alignment between the positivist episteme and the aspects of interpretation and interaction between researcher and research deserve the development of the debate.

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