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A Tribute to Roland Calori's Scholarly Legacy, 20 Years Later

Testimonies and memories by Tugrul Atamer, Rodolphe Durand and Philippe Very, coordinated by Philippe Monin

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Almost 20 years ago, on July 14th, 2002, while fireworks lit up the skies of Marseille, his city of heart, Roland Calori left us suddenly, without warning, at the age of 50, at the moment culmination of his career as a scholar. At that time, he was undoubtedly one of the most cited and influential French researchers in the field of strategic management on an international scale.

Between 1983, when he defended his doctoral dissertation in Aix-en-Provence University, and 2002, he would publish more than 60 articles, books, and chapters, in journals as prestigious as *Strategic Management Journal*, *Organization Science*, *Organization Studies*, *Journal of International Business Studies*, *British Journal of Management*, *Long Range Planning* – his favorite journal with eight articles, *Journal of World Business*, *Organization Studies*, *Human Relations*, *Academy of Management Perspectives*, but also *Organizations*, *La Revue Française de Gestion*, *La Revue d'Economie Industrielle*, *Metamorphosis*, etc. Bibliometric indicators did not yet exist at the time, no doubt he would laugh at his citations, over 5,000, with an h-index > 30 and a g-index > 70!

His international reputation, interdisciplinary work, openness to pluralism in research traditions, and diversity of paradigms, and his legendary energy deployed to define a European school of thought in the field of strategic management – concomitant with the creation of EQUIS – had naturally led Roland to become a member of the Board of Directors of the EGOS Association in 1999. He was the main organizer of the 17th EGOS colloquium, held in July 2001 in Lyon, and was approached to become the Chair of the Association in 2002. He also left us as incoming President of the *Association Internationale de Management Stratégique* (AIMS), at the height of an unfinished intellectual production and probably on the eve of even more creative and stimulating publications. Very

quickly, both AIMS and EGOS¹ would create awards in his name, a tribute to this day without equal.

The authors would like to thank Olivier Germain for his invitation to write these few pages of testimonies and memories, so that the readers of M@n@gement, and beyond the entire AIMS community, (re)-discover the man Roland Calori, his work, and his lasting imprint in the fields of strategic management and organizational theory.

Tugrul Atamer (former professor of strategy, vice-dean for faculty, and dean of emlyon business school)

I first met Roland Calori in 1986 when he and his team invited me to the 'Groupe ESC Lyon' (now emlyon business school) to give a course to students – an excuse to organize interviews and eventually recruit me. At the time, I must admit that I had a very strong reluctance to take the step from the University to a school, as I had a negative perception of the top French business schools in terms of research. My meeting with Roland completely changed my point of view: I discovered a passionate researcher, curious to discover unexplored paths, resolutely open to the international, and moreover, joyful and optimistic.

Ist period – The 'Porterian' approach to the dynamics of industries

Roland firmly believed that excellence in teaching could not exist without excellence in research. He had already published

¹The Roland Calori Prize, sponsored by emlyon business school (France), awarded bi-yearly for the best article published in the journal *Organization Studies* over the previous two years, has been created to pay tribute to Roland Calori's invaluable contributions to the three co-awarding institutions: the journal *Organization Studies*, emlyon business school, and EGOS.

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an article in *Long Range Planning* on strategies for success in emerging industries, based on his doctoral fieldwork in the photovoltaic industry. His taste for field research in strong interaction with companies using the semi-structured interview method would not be denied during his career. He then worked closely with Usinor, Framatome, CGE (Compagnie Générale d'Electricité), and Saint-Gobain on differentiation strategies in stalemate industries. Based on analytical market re-segmentation approaches, he would show that de-trivialization and rejuvenation strategies through innovation were strategic options for firms trapped in competitive stalemate situations according to the BCG typology (1981). This work would lead to an article published in 1988 in a then nascent journal – the *Strategic Management Journal*: 'Differentiation strategies in "stalemate industries"'. It was during this early career period, when Roland was studying the strategies for success in different industrial contexts as defined by Michael Porter, that I joined him. Very quickly, in partnership with some major industrial groups of the time, we would mobilize strategic forecasting methods to study market dynamics and publish 'Dynamics of markets and strategic monitoring', in the *Revue d'Economie Industrielle* (1988).

2nd period – Processes of change and managers' perceptions in relation to the formation of the Single European Market

At the end of the 1980s, Roland took the initiative to create a European research group to study the Single European Market that was to come. Thus, in May 1989, colleagues from Bocconi, Cranfield School of Management, and Groupe ESC Lyon decided to conduct a research program on the perceptions by European managers of the evolution of their industries. At that time, in the field of strategic management, studying managers' perceptions was avant-garde! Roland would coordinate 16 researchers from five European countries (France, UK, Italy, Germany, and Denmark) to conduct 90 semi-structured interviews with 90 executives in four industries (Retail Banking, Brewing, Automotive, and Book Publishing) on a European scale. The European research group MODEM (Managers On the Developing European Market) was born. In parallel, Peter Lawrence and Roland published at Sage, in 1991, *The Business of Europe, Managing Change*. In this book, they tried to understand the way in which leaders apprehended the formation of the single European market and deduced strategies for change to transform both their industries and their internal organizations.

Roland became increasingly interested in the processes of organizational change. He particularly wanted to understand how managers perceive the evolution of their economic and social environment and deduce a future vision for their companies. Are the dynamics of industries and the dynamics of

organizations coupled or uncoupled phenomena? To this question, Roland provided a detailed answer by noting that there were different models of leaders' apprehension of environmental dynamics and asserted that the ideal model consisted of starting from an approximate image of the future, far from the two extremes between rigid planning and management by sight. The first step in a transformative management was, according to him, an image that was not only precise enough to trigger actions but also plastic enough for a perpetual adjustment carried out by a permanent monitoring of the environment. This work led to the publication of a book *L'action stratégique* in 1989, perceived at the time as very innovative, as well as an article published in *Long Range Planning* in 1990 under the title of 'How French managers deal with radical exchange'. These contributions marked an evolution in Roland's intellectual approach and reflected his desire to overcome the dichotomy between positivism and constructivism. For him, strategic management was eminently dialectic, that is, it should be based on understanding the dialectic between subjectivity and objectivity.

Roland loved cross-fertilization and collective learning. With his immense talent as a writer, he knew how to translate shared ideas and knowledge very quickly into articles or books. While working on the MODEM projects, Roland became inspired by Gerry Johnson's work on cognitive schemas. Deploying innovative content analysis approaches, he began to decipher leaders' cognitive schemas, literally *drawing* them in the form of cognitive maps based on interviews carried out in the MODEM study. In executive education, Roland and I have intensively used this cognitive map method to support firms' executive committees in their organizational changes. The simple idea of arguing that change first takes place in the mental schemas appeared as fruitful in the practice of management as in theory. This work led to an article published in 1992 in the *British Journal of Management*: 'French and British top managers' understanding of the structure and dynamics of their industries: A cognitive analysis and comparison', and to Roland's most cited article (1994) as first author in *Strategic Management Journal*: 'CEO's cognitive maps and the scope of the organization'.

Roland's reflections on the specificity of European management caught the attention of the European Round Table (ERT), a lobby bringing together the CEOs and Presidents of 40 major European industrial groups. The ERT commissioned Roland and Philippe de Woot for an in-depth study on the specificities of European management. Roland would seize the opportunity to collect qualitative data with both nondirective and directive interviews with the leaders of these 40 major European industrial groups. Numerous publications would follow, in particular the book written with Helen Bloom and Philippe de Woot, *Management European style*, published by

Kogan Page (1994), and the book published by Prentice Hall and coordinated by Roland in collaboration with Philippe De Woot, *A European management model: Beyond diversity* in 1994.

Following the success of the work of the MODEM (I) group, their members expanded the network in 1993 to 19 researchers from 10 countries and formed the MODEM II group, for an ambitious project aimed at carrying out nondirective interviews with 120 managers of companies operating in four industries: chocolate and confectionery, paint, footwear, and electrical wires and cables. These industries were selected for their mixed international nature (neither global nor multi-domestic). The MODEM II project *The dynamics of international competition in Europe: Top managers cognitions in mixed industries* began in 1994 with the financial support of the European Commission, just a year after the publication of the book published with Tugrul Atamer, *Diagnostic et décisions stratégiques*, which received the AFPLANE Les Echos Grand Prize for the best book on business strategy in 1993 and became a reference textbook in France for 15 years.

The MODEM II project provided a very large volume of qualitative and quantitative data in several languages requiring colossal work in content analysis and data exploitation, thanks to a rigorous methodology developed by Roland and Tugrul Atamer. The most original part of the work was the analysis of the cognitive maps of the leaders, which made it possible to define the geographical scope of the company and the criteria for the definition of the geographical zones (called the fault lines of the global economy). The other important aspect of the work was to discover the innovation strategies that made it possible to exploit the specificities of geographical areas or to transform internationally fragmented industries into more global industries. This project succeeded, thanks to Roland's ability to lead the research workshops, which were very lively and not free from conflicts, sometimes not only related to cultural sensitivities but also to the different methodological sensitivities of the participants. Roland's diplomatic and conflict resolution skills kept the group together. This work led in 2000 to the publication of a book, *The dynamics of international competition: From practice to theory*, published by Sage. In his critical presentation of the book in *International Business Review* (2001), Peter J. Buckley called it comparable in importance to Bartlett and Ghoshal's book on transnational strategies, making a very original contribution. Numerous articles would be published by members of the MODEM II network in various international journals, using the study data.

Philippe Very (Professor of strategy, former head of faculty at EDHEC Business School)

At the end of the 80s, Roland had already published several papers in good academic journals, but decided to jump a step further, targeting the very best international journals. For that

purpose, in parallel to his ambitious MODEM II project, and after a few participations to international conferences, he created a team to explore the topic of international mergers and acquisitions (M&A). He enrolled Michael Lubatkin, one of the most famous researchers at that time, and myself, recently recruited in the strategy department of 'Groupe ESC Lyon', with my recent PhD on a close topic: diversification strategies. Later, John Veiga, a highly reputed US researcher, would join the team. Roland's motivation was to learn how to publish in rank A journals. Michael and John joined because they enjoyed Roland's openness and friendship spirit and because they knew his capacity to deliver good research. I was lucky: I was at the right place, at the right time, and with the right people.

Together we elaborated a huge project aiming at understanding managerial practices of acquiring companies and cultural challenges faced in cross-border acquisitions. We created a database of acquisitions and sent questionnaires to executives of involved companies. Roland and I collected the answers of respondents. Now, let us step back a minute and remember the context at the beginning of the 90s. At that time, Roland and I were in France, while Michael and John were working in their university in the USA. SAS or SPSS software were running on central computers. There was neither Internet (or hardly) nor @emails! Consequently, an international team was essentially working through phone and fax. Hopefully, Roland had invited Michael to deliver an MBA seminar each year, so that Michael could be with us for a month each year. And we profited from that period to work very hard on our research.

Once the respondents' answers collected, Roland and I had started to make a few data analyses. We were working with our French mindset, seeking for a holistic model capable of explaining acquisition performance. When Michael arrived in Lyon, we showed him our model. He opened his eyes wide, looked at us, then asked us a few questions, and said: 'your model is not publishable, but we will make 6 papers in good journals thanks to the data you collected'. Then, he literally explained to us how we should select and treat the data for each of the six projects. Roland was happy: Michael was teaching us how to publish in the best US journals, and it was exactly what he was waiting for. Michael enjoyed a lot the multiple ideas that were sparkling from Roland's mind.

Seven years after the launch of the project, we had published six papers in rank A journals and a few others in less reputed outlets. We learned how to answer to reviewers; we discovered and learned new statistical methods; we learned how to present our research in US conferences; we made connections with many good foreign researchers that would later translate into new research projects. Some of our papers related to administrative heritage, acculturation, or acquisition control became well-known in the M&A field. The dynamics initiated by Roland had been quite successful for all

of us. This experience highlights Roland's capacity to embark people on ambitious and exciting journeys and lead them till their end.

Roland's projects were seriously conducted, but always in a friendly and epicurean atmosphere. We laughed a lot, spent evenings in pubs with music, ate good food, and engaged in discussions about the beauty of life. He remained very simple and accessible despite his fast-growing reputation. The academic world was evolving in the late 90s with the austere perspective of 'publish or perish'. Roland was an UFO (unknown flying object) in this world, demonstrating that conducting serious research and achieving publication could be done in an ambience where researchers felt good. Very good.

3rd period – Philosophy and management

Tugrul Atamer

At the end of the 90s, Roland was pursuing his project to create a European school of thought for strategic management. In this process, Roland did not hesitate to import concepts and knowledge from the philosophy and social sciences. *Philosophizing on strategic management models*, his essay published in 1998 in *Organization Studies*, was an important milestone. That article linked the learning ability of an organization with the cognitive and communicative abilities of its leaders. The link was established by mobilizing the Hegelian dialectical logic on one side, and the hyperdialectic by Merleau-Ponty on the other side, combined with the concept of communicative action by Habermas.

Roland was also very inspired by the pragmatic philosophy of William James. Starting from James's proposition that truth is the function of practical utility, he considered the leaders interviewed as 'ordinary' theorists. Exploiting this idea, Roland and I wrote an article on how leaders define the geographical strategic scope of their activities by considering the 120 managers interviewed within the framework of MODEM II as coauthors. Leaders, co-authors! That article was submitted to one of the most prestigious management journals and was enthusiastically received by the three referees. Yet, the editor-in-chief decided 'with great regret' to reject the publication, arguing that industry leaders could not be coauthors of a scientific article, and that pragmatic epistemology would not be compatible with the editorial line of the journal! This anecdote indicates how much Roland was starting to be recognized as a researcher who broke codes; sometimes, that was too innovative. Roland took up these ideas and published, 'Ordinary theorists in mixed industries' in *Organization Studies* (2000).

Shortly before his death, Roland took up the idea of practitioners as ordinary theorists and combined it with the ontology of creative evolution offered by the philosopher Bergson.

He aimed at illustrating the transformation of the Salomon company through the story told by its former general manager. The article was eventually published in 2002 in *Organization* under the title 'Organizational development and the ontology of creative dialectical evolution'. The article perfectly illustrated Roland's creativity and his ability to build unlikely bridges between theory and practice and between different philosophical currents.

Rodolphe Durand (Professor of strategy, holder of the Joly Family Purposeful Leadership Chair, and founder and academic director of the Society & Organizations Institute at HEC Paris)

I met Roland at my first international conferences in the mid-90s. He came and talked to me after paper presentations and encouraged me to persevere. I was discovering the global game of publications, and Roland shared with me the model he had established at emlyon business school: clear and focused research programs, great teams of international colleagues meeting regularly and working hard around data and a series of papers – and nice ambience and sharing around food, wine, and music. He invited me to join over, to settle down and benefit from the collective and unique experience that existed then at the school. Behind a façade of a management researcher, Roland hid a very dense reflection on epistemology and the constitution of knowledge in and about organizations. Our discussions, while brief on these topics at that time, were essential in convincing me to leave the USA, where I had started my career and to elaborate the idea of a research program. Having been trained in philosophy as well as in management, the perspective of discovering a research team around the social construction of knowledge and management theory intrigued me.

To convince me to join emlyon (end of 1999), in his new role as the first Associate Dean for Research, Roland guaranteed that I would have the means to conduct ambitious research programs: a research budget to buy documentation (in this case, Michelin Guides), pay research assistants, and invite over Huggy Rao, whom I had met while at Emory University. Roland completed the team with a promising assistant professor from emlyon, Philippe Monin. The three of us were successful in developing and implementing a research program following the tracks of Roland's earlier successes (as explained earlier with MODEM I and II, and the project on M&As): innovative empirical domains (in the case, French Haute Cuisine), international teams with more senior and experimented colleagues, big data sets, and the highest ambition. He was able to transmit successfully to others what he had experienced himself.

Roland was an admirable manager; beyond his academic capacity and recognition. He was close to emlyon researchers, as much as he developed his own research projects and

coordinated professional associations. His warmth, upbeat mood in any circumstance, and sharp mind enabled anyone in a difficult time to feel energized and more confident in their chances of success. His capacity to generate positive interactions and make people meet inspired me for the rest of my life. Meeting Michael Lubatkin and following Michael's hard rule of how to write a research paper would not have happened had not in a first place Roland invited us all for early dinner.

During 2001, we had decided to work on a project together on the role of top managers' apprehension of others' differences on organizational change, at the intersection of 'his' epistemology and mine. Our desire was to publish for the first time in *Academy of Management Review (AMR)*. As usual, Roland was deeply involved in reading, and we had enjoyable discussions about the merits of hermeneutics and deliberation. His passing away interrupted the project for a while, which yet went into publication in AMR as a mark of his legacy: 'Sameness, otherness? Enriching organizational change theories with philosophical considerations on the same and the other' (2006). His sudden death left in a disarray his friends, close contributors, and professional environments for which he was so essential.

Roland's legacy can be found in his publications. But even more important, his legacy belongs to a philosophy of researching: connecting people from different horizons, making it a joyful team's effort, and building institutions around a collective vision. Many of us, Tugrul Atamer, Charles Baden-Fuller, Rodolphe Durand, Philippe Monin, Eero Vaara, and Philippe Very – to cite a few – received his practical wisdom as a gift for the rest of our lives.

Philippe Monin (Professor of strategic management, vice-dean faculty & research at SKEMA Business School)

My first contact with Roland Calori and Tugrul Atamer (forever associated in my mind) dates back to Spring 1991, when I finished my graduate studies: they were delivering the 'Synthesis seminar on business policy' – it was not yet the time for strategic management – a 8-week super intensive seminar that concluded the MSc in Management at emlyon for all students. I was literally attracted by both the discipline and these two guys. After graduation, I immediately fulfilled my obligation in the French army as regular soldier, and it is during a short military leave that I came back at emlyon, without notice, asked to meet either Roland or Tugrul, eventually met Tugrul, and asked whether there was some need of an assistant. It is how all started. I had the privilege to develop my PhD under Roland's supervision – I would eventually be his only 'doctoral student' to defend –, also guided by Tugrul Atamer. I would give Roland a 30-page chapter that took me weeks to develop, and he would return it to me the next day, literally entirely rewritten, with hand-annotated explanations in red for each and every comment. Hard and serious work. As an assistant, I wrote a

case study with him, on *The European Brewing Industry and Brasseries Kronenbourg* multidomestic strategy. I would also work extensively, after his death, along with Tugrul Atamer, to update their book *Diagnostic et décisions stratégiques*.

I witnessed the successes of the cooperative MODEM I and II consortium. I observed how Michael Lubatkin, John Veiga, Philippe Véry, and Roland developed their M&A research program. Like Philippe Véry, I was lucky: I was at the right place, at the right time, and with the right people, to learn. And Roland would give me the opportunity to replicate, with my coauthors Huggy Rao and Rudy Durand, what I had observed and learnt. Really, not only hard work but also true moments of friendship and pleasure, with great restaurants, music – I will never forget Roland playing guitar in the desk of his wooden chalet on the hill surrounding Lyon, nor the great moments we shared as epicureans.

Though inadvertently, Roland would also be the initiator of a decade-long cooperation with Eero Vaara, on topics related to identity, legitimacy, culture, and more generally post-merger integration in M&As. I had met Eero in international conferences. When I told him I was working under Roland's supervision, he inquired whether he would be allowed to come and spend one sabbatical year at emlyon and work with Roland. Roland immediately accepted, and Eero – already a strong scholar in M&As at the time – was hoping he could then work with Roland. Unfortunately, Roland passed away only weeks after Eero has settled down in Lyon. Inspired by Roland, Eero and I, along with international junior and senior colleagues from Tilburg, would emulate what Roland had taught us: international team, unique field data (longitudinal merger between Air France and KLM Royal Dutch Airlines), highest ambition, and hard work. And it would pay off, always in a friendly and collegial atmosphere. Research is also about serendipity, and Roland has generated serendipitous positive network effects long after his departure.

These testimonies and memories come to an end. Twenty years later, what invariants, if any, should we retain from Roland's trajectory? At the risk of oversimplification, four salient features seem to dominate his work: *strategy matters*, and this is not entirely trivial in a period when what strategy is, is sometimes hotly debated; *empirical work*, in particular through close and direct interaction with managers and executives, is at the heart of strategy research; *research is collaborative from the earliest stage*, that is, from the design of research projects and programs to empirical work, and not only in the writing and publishing phase; finally, *strategy research is an epistemology of action*, as evidenced by his pioneering work on managers as ordinary theorists. In many respects, *a posteriori*, his interest in ordinary theorists, his pragmatist approach, and his phenomenological perspective, especially in his last period, bear the seeds of the foundations of the 'as practice' movement, which would rapidly develop in the 2000.

We, invited authors to this tribute, sincerely hope that our testimonies will help younger generations better appreciate why the *European Group for Organizational Studies* and *l'Association Internationale de Management Stratégique* (AIMS) routinely celebrate the memory of Roland Calori.

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