

Opportunities and interdisciplinary perspectives for organizational unlearning

This special issue is the first attempt to collect, present, and discuss interdisciplinary perspectives on organizational unlearning. Our idea is based on two central observations. On the one hand, being involved in unlearning research, we, as guest editors, observed that the term has been attracting strong interest in research and practice. However, the field of unlearning has also been confronted with various conceptual issues and empirical challenges. On the other hand, we recognized that the term “unlearning” proves relevant in many different disciplines other than management and organization studies. These other fields of research have not yet intersected with the discourse in the organizational unlearning community. In fact, over the past years, we have talked to philosophers, psychotherapists, historians, and psychologists – who all had different views on unlearning. We agreed that dedicating space for such interdisciplinary perspectives and presenting them to scholars in management and organization studies could be a highly fruitful endeavor.

This special issue contains six original articles that explore unlearning from different perspectives such as psychology, philosophy, arts, and management. Although the articles differ in terms of their research background, they all provide fresh and insightful perspectives on organizational unlearning and offer new opportunities for future research. The presented articles might require unlearning scholars to scrutinize and unlearn their own assumptions, views, and positions to advance the field.

In the remainder of this editorial, we will discuss the underlying motivation of this special issue and present the individual articles as well as their respective contributions.

On the importance of organizational unlearning

In the past few years, organizational unlearning has attracted increasing attention (Klammer and Gueldenberg, 2019). Generally speaking, the concept of organizational unlearning describes the process of deliberate and intentional knowledge loss in organizations. Although only a small part of Hedberg’s (1981) chapter “How organizations learn and unlearn” actually deals with unlearning, many researchers describe his work as “seminal”. Nevertheless, Hedberg was one of the earliest scholars who explicitly linked the term unlearning to an organizational context [please also see Hedberg *et al.* (1976) and Nystrom and Starbuck (1984)]. While early conceptualizations regarded unlearning as subsumable under organizational learning (Huber, 1991), the perception of unlearning has shifted towards defining unlearning as a distinct concept (Tsang and Zahra, 2008). Until recently, research on organizational learning or knowledge management neglected the idea of purposefully discarding old or obsolete knowledge structures.

Similar to Rushmer and Davies (2004), we doubt that individuals, groups, or organizations can learn perpetually. Organizations tend to implement new systems, routines, or beliefs without considering how to deal with existing knowledge structures. Top management then simply hopes for or relies on the fading of embedded cognitive or behavioral patterns. However, existing knowledge might compete with new knowledge and evoke cognitive dissonance as well as resistance in



individuals, which, in turn, hampers learning. We suggest that unlearning, e.g. purposefully discarding knowledge that has been deemed obsolete, serves as an efficient way to initiate and facilitate successful learning and change in organizations.

Several authors have investigated antecedents and outcomes of unlearning. [Hedberg \(1981\)](#) describes unlearning as a phenomenon that is generally problem-triggered. In addition to internal triggers of purposefully discarding knowledge such as ineffectiveness of existing knowledge, routines, or systems ([Starbuck, 1996](#)), external triggers such as environmental turbulence ([Akgün et al., 2007](#)) and customer, competitor, or partner cues ([Sinkula, 2002](#)) also play a vital role in unlearning research. On the other hand, outcomes of organizational unlearning might include increased innovation capability ([Becker, 2008](#)) or room for new knowledge ([Zahra et al., 2011](#)). Organizational unlearning generally involves the activity of purposefully discarding assumptions, beliefs, cognitive structures, values, norms, routines, behaviors, habits, rules, procedures, assets or maybe even emotional elements of an organization.

Using the ongoing debate as inspiration and motivation

This special issue was inspired by the recent debate on the concept of organizational unlearning. [Howells and Scholderer \(2016\)](#) criticize several influential works in the field of unlearning by discussing the articles' empirical foundations and suggesting that the concept has been artificially imported from psychology research. Subsequently, they argue that organizational unlearning best be dropped from scholarly discourse. In 2017, *The Learning Organization* published one-and-a-half special issues on organizational unlearning (Volume 24, Issues 1 and 2). In these special issues, Starbuck (in [Nguyen, 2017](#)) and [Tsang \(2017a, 2017b\)](#) respond to Howells and Scholderer's critique and argue in favor of unlearning. Additional papers from these special issues include conceptual ([Visser, 2017](#)) and strategic discussions ([Morais-Storz and Nguyen, 2017](#)), routine-based approaches ([Fiol and O'Connor, 2017a, 2017b](#)), or practitioner-oriented suggestions for unlearning ([Rupčić, 2017](#)).

We regard this recent attention as powerful indicators for growing interest in organizational unlearning. Even though we believe that the concept of organizational unlearning can help verbalize and characterize certain phenomena in learning or change processes that might not be considered otherwise ([Tsang, 2017a](#)), we are fully aware that much more research is required to create and establish a solid conceptual and empirical foundation of the process. From our point of view, the concept of unlearning needs fresh perspectives and an extended understanding of the phenomenon. For example, in what other areas does unlearning occur? How is unlearning realized? How would researchers from other disciplines (e.g. psychology) measure unlearning? Such questions emerged over a number of discussions among us. Therefore, we deemed it valuable and insightful to organize a setting in which researchers from other disciplines find an outlet to present and discuss their ideas. First, we organized a special track at the IFKAD 2018 conference in Delft. Impressed by the originals works presented as well as the long and intense discussions, we wanted to provide extended space for interdisciplinary perspectives and subsequently organized this special issue in *The Learning Organization*.

Outlining new opportunities and perspectives on unlearning

With this special issue, we aim to enhance the understanding of organizational unlearning. Recent works have connected unlearning with different theories, e.g. from psychology

(Grisold and Kaiser, 2017; Kluge and Gronau, 2018) and (Eastern) philosophy (Brook *et al.*, 2016). The vision of this special issue was to build upon these recent developments and reach out to scholars who might not be familiar with the concept as understood by management and organization scholars, but may be able to offer novel perspectives in terms of theories and methods.

An integral part of the recent debate revolves around the questions if or to what extent unlearning can really be empirically investigated or operationalized. While Peter Drucker and Robert Kaplan's idea of "if you can't measure it, you can't manage it" has often been paraphrased, we interpret part of the ongoing debate about unlearning as "if you can't measure it, you can't prove it exists". Inspired by this controversy, we were particularly interested in contributions that shed light on the empirical investigation of unlearning. This would allow for more profound insights in terms of underlying processes of deliberate knowledge loss in organizations.

Additionally, to advance the idea of the "unlearning organization", we were also interested in prescriptive contributions that explain how an organization might be able to institutionalize unlearning activities as part of their organizational identity (Klammer *et al.*, 2019). The idea of "becoming a learning and unlearning organization" (Morais-Storz and Nguyen, 2017, p. 102) as well as the claim "a learning organization is one which is good at both organizational learning and unlearning" (Tsang, 2017a, p. 46) implicitly point towards a certain kind of symbiosis between learning and unlearning and illustrate the interplay between both concepts.

In an effort to heed our own argument, we purposefully let go of previous conceptualizations and perceptions of the concept to:

- free ourselves from preconceived notions about organizational unlearning; and
- open up the scope for new opportunities and interdisciplinary perspectives.

Opening up the playing field and acquiring a more profound understanding of organizational unlearning

The Learning Organization is dedicated to provide new insights on organizational learning/learning organizations. Two papers aim to address existing conceptual issues (Sharma and Lenka, 2019) and synthesize empirical research (Kluge *et al.*, 2019) in the field of organizational unlearning. In an effort to establish a meaningful distinction between unlearning and relearning, the article by Sharma and Lenka (2019), titled "Exploring linkages between unlearning and relearning in organizations", points to difficulties regarding definitions and conceptualizations. Especially in terms of interdependencies and processes of these concepts, the boundaries are quite unclear and vague. Researchers provide many different definitions and conceptualizations, which ultimately leads to confusion and redundancies. As a result of these issues, researchers might also find it difficult to provide adequate prescriptive advice for practitioners. The authors propose an alternative definition of relearning that – as Becker (2019) points out – might spark further discussion. We believe that their alternative can serve as a starting point for improving existing conceptualizations and developing more unambiguous definitions in future studies.

In their article titled "Investigating unlearning and forgetting in organizations: Research methods, designs and implications", Kluge *et al.* (2019) analyze and synthesize the existing body of research on organizational unlearning and forgetting.

They find and address an imbalance between theoretical and empirical papers. Most empirical studies examine the relationship of unlearning and organizational outcome variables such as innovation. Hence, the authors suggest utilizing a greater variety of research designs and methods to investigate the nature and underlying mechanisms of unlearning. Research questions, designs, and methods are context-dependent. The authors outline different methods that might be useful in examining unlearning. In doing so, they highlight the importance of choosing the appropriate method to a proposed research question and design. This alignment helps researchers acquire a more coherent understanding of empirical results and, therefore, benefits the unlearning literature.

In a single case study using qualitative comparative analysis, [Volland \(2019\)](#) examines the relationship between different power types of rule imposition – domination and self-organization – and organizational unlearning in his article titled “How to intentionally forget rules in newly introduced agile projects: A case study of a multinational automotive company.” Investigating a multinational automotive company that set up agile project structures in its development department, the study finds that both domination and self-organization play crucial roles in the process of organizational unlearning. Managers should pay attention to given power structures in the process of intentionally discarding specific knowledge that explicitly pertains to rules.

Following our idea of incorporating fresh and unusual perspectives on unlearning, we have also included papers from different domains. In her article “Unlearning institutional habits: an arts-based perspective on organizational unlearning”, [Krauss \(2019\)](#) draws on education, feminist, and decolonial literature to analyze underlying mechanisms of unlearning in an arts-based project. From this arts-based perspective, the paper finds two important elements in the unlearning process that are defined by economic, socio-political, and ecological pressures: institution and learning. Both elements are vital in so-called unlearning exercises that were carried out in the change project. In lieu of a standard conclusion, [Krauss \(2019\)](#) illustrates the insights, paradoxes, and outcomes of merging education, feminist, and decolonial literature from an arts-based perspective with her empirical findings. She suggests that:

- organizational unlearning can be perceived as practicing collectively otherwise;
- unlearning exercises are not directly transferable to other institutions; and
- we need to unlearn the promise of limitless economic growth.

[Peschl \(2019\)](#), in his paper titled “Unlearning towards an uncertain future: on the back end of future-driven unlearning”, discusses the challenges of organizational unlearning in the context of a highly complex and uncertain world from a philosophical perspective. Drawing on interdisciplinary fields such as organization studies, systems theory, cognitive science, and innovation studies, the author highlights the question of the “where-to” in the unlearning process. Often, desired goals and outcomes of new assumptions, beliefs, values, or routines are defined prior to a specific change process that involves unlearning. However, organizations are subject to high levels of uncertainty and complexity. [Peschl \(2019\)](#) therefore proposes to follow a strategy of future-oriented open-endedness when initiating organizational unlearning processes. This involves co-becoming with an unfolding environment and should be perceived as an open-ended strategy that helps to identify emerging future potentials rather than following pre-defined unlearning outcomes.

Becker (2019) insightfully paints a picture of the current state of organizational unlearning research by intertwining past developments with the articles published in this special issue. She specifically refers to two specific challenges in organizational unlearning. First, the concern regarding nomenclature that is grounded in definitional issues of the term. Second, how organizational unlearning should evolve in the developing stage of the concept. Phenomena in management and organization studies typically go through three phases: embryonic, developing, and mature phases (von Krogh *et al.*, 2012). While it has evidently not arrived the mature phase, Becker (2019) asserts that “unlearning is struggling to navigate the developing stage” (p. 539). The current debate suggests that unlearning is “stuck-in-the-middle” between different evolutionary phases. However, “being stuck” often implies negativity because it generally refers to situations in which one is incapable of getting out of or taking action. In contrast, Becker – in a very encouraging manner – calls for more empirical research that helps to gather evidence in an effort to reach acceptance of the unlearning concept. In this sense, we would label the unlearning literature as “hot iron” that can still be molded into a generally accepted form and design.

Where to go from here

Although the papers are highly diverse in terms of their backgrounds and underlying assumptions about unlearning, they all have one thing in common: providing fresh perspectives on unlearning and contributing interesting and provoking ideas to the ongoing debate. We, as guest editors, find the way researchers from diverse disciplines approach, analyze, and think differently about the phenomenon exceptionally fascinating; we hope that the reader finds this equally intriguing. We therefore believe that this special issue opens up the playing field for future researchers by simultaneously deepening and broadening the understanding of organizational unlearning in different contexts.

In addition to broadening the scope, this special issue also involves conceptual and empirical research that deepens our understanding of organizational unlearning from and with different perspectives. Definitional difficulties and conceptual redundancies regarding organizational learning, unlearning, and relearning need to be resolved to provide adequate prescriptive advice for practitioners. We suggest that future studies employ a more holistic perspective to advance the fields of organizational learning and the learning organization as well as organizational unlearning and the unlearning organization. Furthermore, this special issue highlights the need to better align research questions and/or research designs with the method used to empirically investigate unlearning in organizations. This would lead to a more coherent interpretation of empirical results and, therefore, to a more profound understanding via a greater variety of methods.

Considering interdisciplinary perspectives on unlearning (which includes fresh insights from psychology, philosophy, cognitive science, arts, and management as illustrated in Table I), this special issue outlines possible connecting fields and contexts. Understanding how researchers from other domains think and write about unlearning may help researchers from management and organization studies start scrutinizing (and maybe unlearning) their own taken-for-granted assumptions and dominant logics about the concept. In particular, assuming arts-based, philosophical or psychological perspectives, as well as merging and intertwining unlearning with literature from education, feminism, decolonialism, systems theory, or cognitive

Table I.
Overview of
interdisciplinary
papers published in
this special issue

No.	Author(s), title	Interdisciplinary perspective(s)	View on organizational unlearning
1	Peschl, M., "Unlearning towards an uncertain future: on the back end of future-driven unlearning"	Philosophy and cognitive science	An open-ended process where knowledge is being discarded and the outcome is unknown
2	Volland, M., "How to intentionally forget rules in newly introduced agile projects: A case study of a multinational automotive company"	Management and routines (rules)	Intentional forgetting of organizational rules through the substitution of new cues
3	Krauss, A., "Unlearning institutional habits: an arts-based perspective on organizational unlearning"	Arts	The process of critically scrutinizing and investigating normative structures and practices to identify and get rid of taken-for-granted truths of theory and practice
4	Sharma, S. and Lenka, U., "Exploring linkages between unlearning and relearning in organizations"	Management	A process which involves deliberately discarding old knowledge, behaviors, or routines that help organizations remain competitive and creative
5	Kluge, A. <i>et al.</i> , "Investigating unlearning and forgetting in organizations: Research methods, designs and implications"	Psychology and management	A process of purposefully discarding and replacing old routines to support the objective of installing new routines. This concept poses interesting challenges in terms of methodology and data collection
6	Becker, K.L., "Organizational unlearning: the challenges of a developing phenomenon"	Management and organization	A process that refers to a) a loss or reduction of application of past knowledge, behaviors, or routines, b) that this loss or reduction can be either intentional or accidental, and c) that such loss can be positive or negative for an organization

science, widens the playing field for future research. We believe that there are many more fields of research that are worth connecting to the concept of unlearning.

Summing up, to contribute to the evolution of the unlearning concept, we encourage future researchers to explore the opportunities in several ways:

Making organizational unlearning a useful concept that can be applied in interdisciplinary and differing contexts. Even though there is no one-size-fits-all definition, it is possible to build a contingency model showing the relevance of unlearning and how it can be implemented in different contexts. By systematically studying different contexts using the same conceptualization of the unlearning phenomenon, which, for example, [Becker \(2019\)](#) has suggested, future studies can collectively illustrate a contingency model of organizational unlearning. The approach of building a contingency model has already been applied for the learning organization idea ([Örtenblad, 2013](#); [Nguyen, 2019](#)), which can help us identify situations in which the concept is relevant and applicable. The goal is to evolve the unlearning concept into a wider community of scholars with diverse backgrounds who share the same interest ([Becker, 2019](#)).

Being aware of previous empirical work. In the process of building such a contingency model through empirical studies, researchers should be aware of previous empirical works. This enables scholars to relate to and expand upon prior findings and allows for acquiring a more coherent understanding of empirical results. Kluge *et al.* (2019) reviewed and synthesized a broad range of research strategies for organizational unlearning, including research designs and research methods. This wide array of research strategies should prove useful for future researchers to choose from a set of appropriate designs and methods for a given context. Mixed-method and innovative approaches as illustrated in Volland (2019) are highly appreciated.

Collaborating and co-creating for acquiring new insights in the field of organizational unlearning. Collaboration and co-creation between scholars from different disciplines as well as gathering fresh perspectives are the fundamental to ensure the creativity, generalizability and evolution of the concept. Therefore, organizing interdisciplinary workshops, seminars, and conferences as platforms for scholars from different fields will certainly prove beneficial to create a sustained unlearning community. Exchanging differing perspectives and viewpoints on the same phenomenon would allow us to create a common understanding (and language) of the unlearning. This approach of cross-fertilization, in turn, would also benefit the individual domains. Assuming the role of a lone wolf does not help improve the field – quite the contrary – the field of unlearning can only be advanced by a joint effort.

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