



Challenges of Semiotic Abduction in Management Research

Igor Filatotchev^a , Marco Giarratana^b,
Martina Pasquini^b and Konstantina Valogianni^b

^aKing's College London; ^bIE University

ABSTRACT This *Counterpoint* challenges Fleming and Oswick's (2025) *Point* paper and their notion of *loosely coupled abduction*. Whereas their *Point* emphasizes how abductive theorizing can balance creativity and rigor through consensus-based plausibility, we argue that this very reliance on consensus carries epistemic risks. Specifically, abductively posited mechanisms may become established through repetition and shared acceptance rather than empirical verification. We define this heuristic process as *semiotic abduction*, an unintended consequence of the consensus rule emphasized in the *Point*. Whereas the *Point* emphasizes how abduction can be disciplined in the formation of theory, beginning with anomalies and gaining plausibility through informed consensus, we highlight the danger that such mechanisms may gain traction without sufficient validation. Semiotic abduction, we argue, risks fostering mechanism drift, theoretical ambiguity, and the fragmentation of research domains around unverified assumptions. We conclude by offering recommendations to mitigate these risks.

Keyword: semiotic abduction

INTRODUCTION

In their *Point paper*, Fleming and Oswick (2025) outline how theorizing benefits from a loosely coupled abductive approach. This approach provides a middle ground between uncoupled abduction fostering creative leaps (Hansen, 2008) and tightly coupled abduction that emphasizes disciplined theorizing protocols (Sætre and Van de Ven, 2021). Their taxonomy highlights the tension between creativity and rigour in abductive reasoning, proposing a way of balancing imaginative theorizing with empirical plausibility.

Address for reprints: Igor Filatotchev, King's College London, Bush House, 30 Aldwych, London WC2B 4BG, UK (igor.filatotchev@kcl.ac.uk).

This is an open access article under the terms of the [Creative Commons Attribution](https://creativecommons.org/licenses/by/4.0/) License, which permits use, distribution and reproduction in any medium, provided the original work is properly cited.

Our *Counterpoint* challenges this proposal. We acknowledge the promise of loosely coupled abduction in sustaining creativity and plausibility in theorizing. Yet, we contend that reliance on consensus as a validity criterion introduces a critical epistemic vulnerability. Specifically, consensus can entrench abductively theorized mechanisms that remain empirically untested, as subsequent studies reproduce and extend them, granting legitimacy through accumulation rather than verification. We refer to this process as *semiotic abduction*. In this regard, our concern is not with the creative process of theorizing per se, but with the longer-term risks to knowledge accumulation when consensus-based plausibility is mistaken for empirical validation.

Thus, our *Counterpoint* offers a complementary perspective on abduction in management research. Instead of emphasizing the epistemological trade-offs in theory formation, we underscore the risks that emerge when scholars take a positivist approach in their research, where abduction frequently operates through the generation of novel mechanisms (Cornelissen and Durand, 2014; Durand and Vaara, 2009). Specifically, we argue that abductively proposed *mechanisms* (M), introduced as logical constructs to connect *actions* (X) and *outcomes* (Y), may become widely accepted within scholarly communities even without sufficient empirical verification. Over time, these mechanisms gain the status of taken for granted explanations, treated as empirically verified not through testing but through their wide acceptance and circulation (Colquitt and Zapata-Phelan, 2007; Miller and Tsang, 2011), in line with the notion of *semiotic abduction* (Eco, 1979; Lewis, 1969).

To illustrate this concern, consider a common management question that could easily arise in an MBA or executive education class: ‘How can we empower employees to stimulate innovation and creativity?’ From the vantage point of a positivist epistemological orientation, such questions are typically addressed through an underlying theoretical chain of *action* (X) \rightarrow *mechanism* (M) \rightarrow *outcome* (Y), where M often generates competing explanations (Colquitt and Zapata-Phelan, 2007; Cornelissen and Durand, 2014; Cornelissen and Werner, 2025). One instructor could suggest that actions such as team building (X) work through organizational identification (M) to increase creativity (Y). Another could attribute the effect to mechanisms of personal agency and monetary incentives. Both logics are theoretically coherent, yet the empirical verification of the underlying mechanisms may remain ambiguous or entirely lacking, so that different MBA classes could arrive at different answers depending on the theoretical orientation of the instructor.

In this respect, semiotic abduction implies that theory development might incorporate mechanisms linking actions and outcomes that lack consistent empirical observation (Eco, 1979; Katz and Fodor, 1964; Miller and Tsang, 2011; Peirce, 1955). These mechanisms remain theoretically and logically coherent but are only ‘*suspected to be true*’ (Peirce, 1955). As a result, semiotic abductive reasoning allows multiple explanations to coexist, each gaining credibility through alignment with prior theory. This perpetuates unresolved rival conjectures and reinforces our concern that abductively posited mechanisms can evolve into accepted truths despite remaining unverified.

This form of theorizing can lead to what we term *mechanism drift*: mechanisms initially proposed as placeholders or conjectures are elevated to the status of ‘truths’, forming isolated research communities and narrowing theoretical debate (Fleetwood, 2004; Gergen, 1999). Different communities may anchor themselves in different untested mechanisms, generating trajectories that resist integration. The outcome is theoretical

ambiguity and epistemic slippage, in which fields are organized around internally consistent yet potentially unverified assumptions (King et al., 2019).

Importantly, this concern cuts across all three forms of abduction outlined by Fleming and Oswick (2025) in their *Point*. Whether uncoupled, tightly coupled, or loosely coupled, abductive reasoning involves the imposition of mechanisms that are logically consistent but not empirically verified. Our critique emerges from engaging with this taxonomy through a more positivist lens, using its categories to question how abductively posited mechanisms gain legitimacy. While the *Point* promotes loosely coupled abduction as a balanced route to plausible theory through informed consensus, we stress the vulnerability inherent in that reliance: when consensus substitutes for empirical verification, mechanisms risk becoming semiotically established, accepted not because they are rigorously tested, but because they are repeated and circulate within scholarly communities. Relatedly, our *Counterpoint's* central question is whether abductively posited mechanisms that lack empirical validation should continue to sustain a research trajectory, or whether the absence of evidence should ultimately signal its termination. Our emphasis, therefore, is not on refining the process of theorizing, but on interrogating the consequences of mechanism crystallization for the long-term evolution of management knowledge.

To mitigate these risks, we argue that management theory building should integrate the logic of discovery and the logic of justification within a continuous abductive cycle. Building on the notion of the 'abduction cycle' or 'abduction sequence' (e.g., Behfar and Okhuysen, 2018; Golden-Biddle, 2020), we contend that abduction – while an invaluable starting point for theory generation, especially in novel or highly complex management phenomena – should be recursively combined with robust validation methods of testing and generalization to achieve theoretical credibility and broader acceptance (Giarratana, 2024). To avoid the problems associated with semiotic abduction in management theory – namely, limited empirical rigour, excessive subjectivity, and weak generalizability – theory building should evolve into a structured yet creative methodology where validation is embedded within the abductive process itself. In sum, abduction is not merely an imaginative point of departure, but a reflexive and iterative process that anticipates and incorporates its own path of validation.

Specifically, we call for a more reciprocal methodological integration between qualitative and quantitative research, moving beyond the traditional division of labour. In our view, quantitative studies should focus on identifying and testing the macro-level causal connection between *actions* (X) and *outcomes* (Y), while qualitative research should centre on empirically validating the *mechanism* (M) that links them. This approach may address an unhelpful tendency in management research when quantitative studies claim to have 'nailed down' a mechanism and qualitative studies propose context-specific X – Y patterns without causal validation and generalization. Further, we argue for a more connected theoretical design in which both methods are purposefully aligned to explore an overall chain of causation inside a theory ($X \rightarrow M \rightarrow Y$). Such cross-method complementarity can limit the unintended consequences of semiotic abduction and foster a more cumulative and empirically grounded advancement of management knowledge.

THEORY-BUILDING APPROACHES

The Role of Theoretical Mechanisms in Theory Building

Management scholars embrace diverse interpretations of theory and theorizing. Cornelissen and Werner (2025) observe that ‘different conceptions about what causal mechanisms are and how they are identified currently feature alongside each other, creating conceptual ambiguity and linguistic confusion with researchers often seemingly talking past each other’. Building on Habermas (1971), Cornelissen et al. (2021) distinguish between explanatory, interpretative, and emancipatory theorizing. Our focus lies mainly on the explanatory category typically linked to a positivist epistemology (and objectivist ontology) and where theory is expected to identify key processes and mechanisms for explaining outcomes. While our reasoning is closest to this perspective, our analysis of semiotic abduction nevertheless also has implications for constructivist and interpretivist approaches, as we elaborate later.

In this context, we distinguish between two forms of validity. Logical validity refers to a theory’s internal coherence (Beall, 2010), the consistency of the argumentation chain linking *actions* (X) to *outcomes* (Y) passing throughout *mechanisms* (M), such that no logically consistent counterexample can be constructed (Durand and Vaara, 2009). Empirical validity exists when parts of this theoretical chain are substantiated by data. A theory may therefore be logically sound but still lack empirical grounding. In much management research, empirical testing focuses on the $X \rightarrow Y$ link, leaving mechanisms largely assumed rather than observed. Even when anomalies are consistently observed, as Fleming and Oswick (2025) emphasize in their *Point* as the starting point of abduction, the explanatory mechanism attached to them may still become semiotically established rather than empirically verified.

Consequently, our understanding of mechanisms aligns with Cornelissen and Werner’s (2025) view: causal relationships between potentially observable independent (*actions*, X) and dependent (*outcomes*, Y) variables, enacted through ‘entities and activities’ that produce the outcome. This framing highlights the risk that abductive theorizing can generate logically consistent but unverified mechanisms. Specifically, semiotic abduction arises when research introduces mechanisms as theoretical explanations, but empirical testing examines solely the direct action–outcome relationship. In such cases, mechanisms remain logically plausible but empirically untested, gaining credibility through repetition rather than validation. The generative theory-building process, therefore, involves constructing causal associations across these three components, following certain logical rules (Durand and Vaara, 2009; Shaw, 2017). Consistent with Colquitt and Zapata-Phelan’s (2007) view of high-novelty theorizing, this process highlights how abduction introduces new mechanisms that expand established explanatory logics.

Scholars have three research approaches at their disposal to address the logical link from actions to outcomes through mechanisms (Beall, 2010; Eco, 1979): deduction, induction, and abduction. This diversity is mirrored in the variety of approaches within management research, encompassing induction (such as case-based and ethnographic studies), deduction (purely theoretical predictive work), and abduction

(Bitektine, 2008). Using abduction, researchers observe an action and an outcome and then impose a mechanism that is assumed to be truthful and that should ensure a logical validity to the theory. As noted by Peirce (1955, p. 152), ‘the surprising fact, C, is observed; But if A were true, C would be a matter of course. Hence, there is reason to suspect that A is true’. By using contrasting reasoning, researchers must explore several distinct mechanisms to explain the outcome. The role of mechanisms is central, because abduction implies ‘inference of a mechanisms from an assumption and a result’ (Eco, 1979, p. 185). For this reason, abduction uses contrastive reasoning: Because the outcome of an argument is suspected to be true, it is worthy of pursuit through observation. Thus, abduction imposes non-observable logical mechanisms between some actions and outcomes (Josephson, 2000).

In this respect, Fleming and Oswick’s (2025) *Point* focuses on the formation of theory. Their typology of uncoupled, tightly coupled, and loosely coupled abduction seeks to discipline abductive reasoning by balancing creativity with systematic rigor. Our *Counterpoint* takes a different perspective. We are less concerned with how abduction is applied in theory development and more with whether the theories it produces ultimately constitute valid representations of reality. By shifting attention from the process of theorizing to the question of verification, our perspective highlights the importance of ensuring that abductively generated theories do not merely appear plausible but are subjected to empirical scrutiny as truthful explanations of the phenomena they claim to represent (Popper, 1959). Figure 1 illustrates the above argument as it is applied within a significant body of management research: in an empirical model, actions have the role of exogenous, independent variables, (referred to as X s). Outcomes reflect the empirical regularities associated with a dependent variable, Y . Empirical testing usually involves rejecting the randomness of a causal

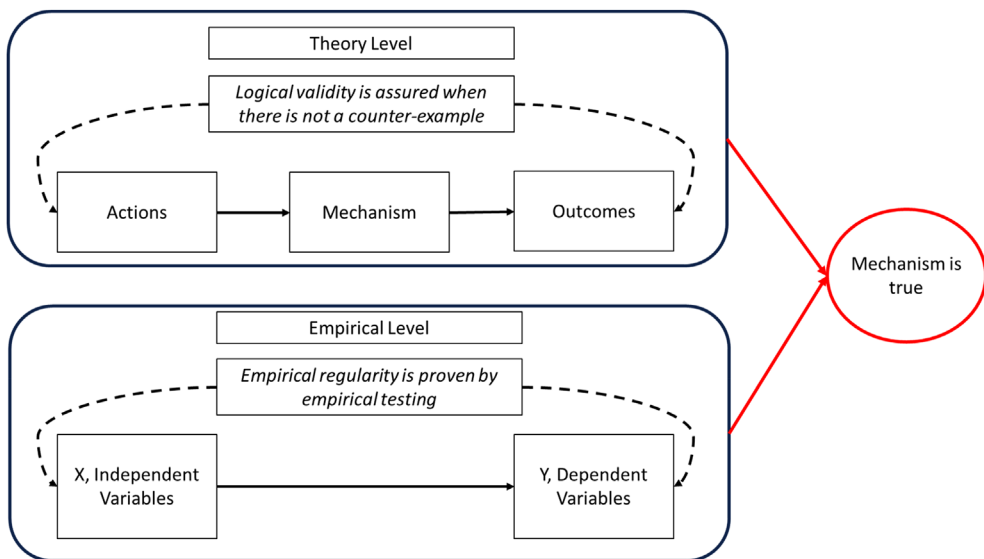


Figure 1. Theory, empirics and semiotic abduction

Note: The red line represents the semiotic abduction.

nexus between Y and Xs . According to a general probability approach derived from Popper (1959), a theory might be logically sound but could be empirically refuted if the evidence fails to sufficiently reject the probability that a specific empirical causal connection is random (Ormerod, 2009). What is important to note is that in many empirical tests within management studies, the focus remains primarily on establishing the causal connection between actions Xs (*actions*) and Ys (*outcomes*), often without considering the empirical existence of a specific logical mechanism. Therefore, within an abductive framework, a logically valid theory successfully passes the empirical test of falsification when the randomness of the causal link between Xs and Ys is rejected with enough probability.

From Abduction to Semiotic Abduction: Creativity vs. Ambiguity

In Fleming and Oswick's (2025) *Point*, abduction provides a basis for theory generation (Durand and Vaara, 2009) by extending or challenging existing approaches (Cornelissen and Durand, 2014; Mithani and Kocoglu, 2024). In this sense, abduction logic can make a specific theory more fungible, applicable to different contexts, and malleable in explaining unrelated phenomena. This process is particularly likely when theories are decomposable into knowledge elements that can be recombined in diverse contexts (Simon, 1962), resulting in theory malleability (Yayavaram and Ahuja, 2008). Through abduction, different malleable knowledge components can be adapted without compromising the consistent link between assumptions and conclusions.

However, the abductive approach has a potential problem associated with introducing ambiguity into scientific reasoning. In our *Counterpoint*, we label this phenomenon as semiotic abduction (Eco, 1979). First, semiotic abduction can lead to a domestication phenomenon, involving the streamlining or modification of the original theory to fit stylized empirical facts (Oswick et al., 2011) without any robust tests of the logic of the same theory. Secondly, within empirical testing, only the causal relationship between Xs and Ys is usually clearly assessed, while abduction could foster theory inferences that attribute empirical validity also to the mechanisms, even though they are not empirically tested, but are only logically connected within a theory.

As outlined in the introduction, semiotics considers verbal and non-verbal signs and symbols as systems of meaning production. Thus, a sign is a combination of words, images, and/or behaviours imbued with meaning. In semiotic terms, the attribution of a new meaning (signified) to a perceptible object (signifier) usually occurs within a system of understanding grounded in conventions shared by a specific group of researchers. In our context, semiotic abduction occurs when a theory establishes a valid logical sequence of connections: actions lead to outcomes through certain assumed mechanisms, and empirical tests prove a causal link between Xs (*actions*) and Y (*outcomes*). Thus, semiotic abduction follows a flawed scientific narrative: since there is empirical evidence validating the link between Xs and Y , and a theory exists that logically embeds a mechanism within this specific relationship ($actions \Rightarrow outcomes$), it is assumed that these mechanisms should also hold true (Heckman and Singer, 2017). Thus, we could consider semiotic abduction as a process that transmits and perpetuates unwarranted scientific legitimacy to mechanisms that remain untested. This

legitimacy is taken for granted and even passed down through different generations of researchers. These arguments resonate with Habermas' (1971) view that the production of scientific and social knowledge is tacitly shaped by knowledge-constitutive interests, as mentioned above. Our analysis aligns thus with the practical interest he identifies; namely, the aim of supporting the social reproduction of human communities through intersubjective norms of culture and communication.

Semiotic abduction cuts across the three types of abduction outlined in the *Point*. In uncoupled abduction, the risk is most evident: mechanisms are often posited as imaginative leaps with little empirical anchoring. In loosely coupled abduction, the tension remains, as abductive conjectures are only partially constrained by available data and conceptual frames. Even in tightly coupled abduction, where anomalies must be observed consistently rather than treated as outliers, the same issue arises: the anomaly may be real, but the explanatory mechanism linked to it may still go untested. Moreover, the *Point* suggests that the plausibility of abductive reasoning is mainly established through informed consensus rather than direct, sound empirical verification. While consensus and dialogue are indispensable for the evolution of ideas, our concern is that, without a shared empirical scrutiny, the phenomenon of mechanism drift may become increasingly pervasive. In this respect, our *Counterpoint* highlights a complementary challenge: mechanisms inferred through abduction should not merely be established by scholarly consensus but need to be empirically tested if they sustain valid and enduring research trajectories.

Such mechanism drift may result in the coexisting of competing theories that claim to explain the same phenomenon (the link between actions, X and outcomes, Y), or in single theories stretched to account for unrelated domains (Agarwal and Hoetker, 2007; Whetten et al., 2009; Birkinshaw et al., 2014). These processes underlie some of the criticisms of management theories, such as their lack of creativity or truly indigenous insights, which might stem from the 'prevalence of retrofitting theories borrowed from outside disciplines' (Suddaby et al., 2011, p. 237).

The significance of these concerns regarding the potential theoretical pitfalls associated with semiotic abduction can vary in intensity depending on the context and application. Empirical research in management studies spans a broad spectrum, ranging from pure qualitative studies to comprehensive quantitative analyses. In the realm of explanatory theorizing (Cornelissen et al., 2021), articles that employ regression analysis with secondary data to explore firm-level phenomena represent an ideal environment for semiotic abduction. Conversely, studies utilizing laboratory experimental data, particularly those focused on micro-behaviour, are better suited for directly examining theoretical mechanisms, thereby exhibiting a lower incidence of semiotic abduction (Giarratana, 2024).

There is a spectrum of semiotic abduction between these two extremes. Moreover, approaches characterized by purely theoretical analyses without empirical evidence or those based on qualitative data, such as case and ethnographic studies, warrant a separate discussion. We regard theoretical papers as purely abductive due to their lack of empirical evidence, while qualitative studies may provide insights into mechanisms. Hence, in these instances, the level of semiotic abduction should be evaluated based on the amount of qualitative evidence presented on the mechanisms. We do not contend that semiotic processes can emerge in all modes of theorizing, including induction and deduction. Rather, we argue that semiotic abduction, as we define it, is more

naturally associated with abductive theorizing, where mechanisms are often posited as suspected rather than empirically verified. By contrast, in inductive or deductive theorizing, mechanisms are typically derived from observed data and therefore tend to be empirically grounded.

SEMIOTIC ABDUCTION: UNINTENDED CONSEQUENCES AND REMEDIES

If abduction is viewed as a theory-building process that encourages creativity as Fleming and Oswick (2025) argue in their *Point*, it also introduces the potential for ambiguity (Suddaby et al., 2011), when it turns into semiotic abduction. As King et al. (2019) explain, abduction provides logically valid conjectures and an empirically verified link between assumptions and conclusions, which can be subject to testing. Therefore, abduction has its maximum potential when it is used for exploring new research trajectories, prompting subsequent research to test the empirical validity of the mechanisms. However, when abduction acquires a semiotic connotation, it often leads to incremental trajectories where the logical validity of suspected mechanisms is taken for granted, creating several problems.

One potential problem is related to the logical validity of a specific theory. The malleability of mechanisms may compromise the logical validity of the original theory when applied to explaining a focal *actions* \Rightarrow *outcomes* link. While semiotic abduction allows for malleability in theory development, it can also introduce a non-neutral mechanism recombination, which could affect the overall structure and logical validity of a theory. We simplify and generalize this discussion in a 2×2 framework presented in Table I, which reflects whether the original theoretical mechanisms change in the process of further theory development or not, and whether they are observable or not. In this regard, Fleming and Oswick's (2025) *Point* provides valuable suggestions for the formation of theories, whereas our *Counterpoint* adopts a more positivist perspective in which the verification of theories plays a central role. In this framework, Quadrant I represents the lowest level of ambiguity, where the theory is used in its original form, maintaining its logical validity and perfectly aligning it with the empirical phenomenon. Quadrant II produces a medium-low level of ambiguity, as the mechanisms correctly align with the empirical phenomenon but deviate from the original structure of the theory, potentially compromising logical validity. Quadrant III exhibits a similar level of ambiguity compared to Quadrant II, as the logical validity is maintained, but the mechanisms remain suspected and unproven. Quadrant IV represents the highest level of ambiguity, as the research uses suspected mechanisms that are also differently applied in a recombined manner, differing from the original theory structure. In this case, a lack of logical validity and empirical uncertainty are present.

Thus, when researchers develop a theory by relying on semiotic abduction, they should assess how such changes affect both logical validity and empirical observability. Table I aims to provide a diagnostic map for this evaluation, organizing four possible situations that emerge from the intersection of these two dimensions. In Quadrant I, mechanisms remain unchanged and observable: the theory retains both logical validity and empirical grounding, and no immediate action is required. In Quadrant

Table I. Implications of different usages of theoretical mechanisms in theory building

		<i>Compared with the original theory, mechanisms are</i>	
		<i>Changed</i>	<i>Unchanged</i>
Mechanisms are	Observable (testable)	<p>II</p> <p>Theory might lose some logical validity but empirically fits the context</p> <p>ACTION: <i>Confirm logical validity again</i></p>	<p>I</p> <p>Theory is logically valid and empirically fits the context</p> <p>ACTION: <i>No action suggested</i></p>
	Not Observable (non-testable)	<p>IV</p> <p>Researcher uses a strong form of abduction logic. Theory might lose some logical validity. Ambiguity about the validity of mechanisms exists because they remain conjectures.</p> <p>ACTION: <i>Confirm logical validity by checking the existence of counter examples. Try to compare results with competing mechanisms</i></p>	<p>III</p> <p>Researcher uses a mild form of abduction logic. Theory is logically valid, but ambiguity about the validity of mechanisms exists because they remain conjectures.</p> <p>ACTION: <i>Compare results with competing mechanisms</i></p>

II, mechanisms are changed but still observable: the theory may gain empirical fit at the cost of logical coherence, and authors must therefore reconfirm that its internal logic remains valid. In Quadrant III, mechanisms are unchanged yet unobservable, a mild form of semiotic abduction in which the theory preserves logical soundness but lacks empirical confirmation. Researchers should compare results with competing mechanisms to strengthen robustness. Finally, Quadrant IV represents the strongest form of semiotic abduction, where mechanisms are both changed and unobservable. In this quadrant, logical validity and empirical verifiability are simultaneously uncertain. Theorists effectively propose novel mechanisms as conjectures without clear means of testing them. The recommended course of action, as noted in Table I, is to reconfirm logical validity through counterexample analysis and to seek at least partial empirical triangulation to prevent theoretical self-reference or detachment from observable phenomena.

Table II builds directly on this diagnostic framework, translating the implications of each quadrant into practical recommendations for research. The ‘Theory’ row primarily relates to Quadrants I and II, where authors should verify whether the assumptions of the original theory remain valid after mechanism recombination and actively search for counterexamples to re-establish logical coherence (Durand and Vaara, 2009). The ‘Empirics’ row corresponds mainly to Quadrants III and IV, where mechanisms remain untested or unobservable. Here, the emphasis shifts to developing empirical strategies, qualitative, quantitative, experimental, or mixed-method, that render mechanisms observable and test their causal relevance. By consciously embedding abduction as an initial hypothesis-generating engine within a disciplined, multi-methodological process,

Table II. Implications of semiotic abduction for research

		<i>Research activity</i>	
	<i>Stylized facts</i>	<i>Potential problems</i>	<i>Proposed solutions</i>
Theory	Theory mechanisms are used with different intensities and in different combinations, compared with the original theory. The use of a particular combination takes hold as a consolidated and legitimate trajectory	Is logical validity maintained?	<ol style="list-style-type: none"> 1. Check if the assumptions of the original theory are the same and can be confirmed. 2. Find a counterexample, based on mechanisms that are missing or used with scarce intensity, to test logical validity within the original theory.
Empirics	Mechanisms are not observable/tested	Contrasting but still logically valid theoretical mechanisms are empirically supported and independent research trajectories proliferate	<ol style="list-style-type: none"> 1. Obtain quantitative or qualitative empirical validation of a particular set of mechanisms. 2. Test the presence of competing alternative mechanisms.

management research can harness its creative power while mitigating its inherent risks related to rigour and generalization.

By reducing the unobservability of mechanisms, researchers can facilitate the adoption or rejection of a particular theory. Rapidly developing methodologies based on AI and machine learning present an innovative approach that enhances qualitative analysis and processing of large volumes of publications and other textual material. The ability of such methods to process large volumes of textual data allows for a more holistic analysis of diverse publications and documents; hence, they can expand the capabilities of human readers who have limited or biased cognitive capacity. Although we recognize that, at present, there may be limitations in terms of interpretations of various constructs and data patterns, as the algorithms' quality improves, more robust results could be achieved in the future.

Furthermore, researchers can design ad hoc empirical tests to exclude competing theoretical mechanisms. One approach is to introduce controls that represent key mechanisms in competing theories and test subsamples in which those variables exhibit null or maximum variation. Qualitative approaches could also be very useful in giving in-depth evidence of the ongoing mechanisms, and details in which manner they are unfolding in reality. We are aware that there exists a trade-off between the precision of empirical validation of mechanisms and the generalizability of the arguments presented. Given the typical impracticality of including theory generation, empirical testing of main relationships (*actions* \Rightarrow *outcomes*), and validation of theoretical mechanisms in a single paper, a division of scientific labour within the scholarly community is highly recommended. A classic example would involve a purely theoretical paper introducing a novel approach to explain a phenomenon, followed by a paper

empirically testing the relationship between actions and outcomes using regression analysis on a large dataset, and a qualitative paper investigating the assumed mechanisms within this relationship. This collaborative approach, based on a mixed-method dialogue between articles and researchers, would likely reduce the evolution of self-contained scientific trajectories characterized by semiotic abduction and foster a more cohesive and fruitful interconnection between scholars across different domains. In this respect, rather than viewing research groups focused on regression-based, experimental, and qualitative methods as separate and sometimes opposing scientific communities, fostering dialogue, discussion, and ‘collaborative confrontation’ among the different methodologies used within a specific research area is recommended to mitigate semiotic abduction.

DISCUSSION AND CONCLUSIONS

This *Counterpoint* complements Fleming and Oswick’s (2025) *Point* by acknowledging that abduction plays a vital role in stimulating creativity and novelty in management and organization studies. Yet, while their focus is on improving the formation of theory through a taxonomy of abductive practices, our concern lies with questions of verification. In the *Point*, the abductive process begins with an anomaly or interesting phenomenon and achieves plausibility through scholarly consensus. By contrast, our perspective emphasizes that abductively posited mechanisms require empirical verification if they are to stand as valid explanations of reality. Without such scrutiny, mechanisms may become semiotically established, gaining legitimacy not through observation, but through repetition and shared acceptance within scholarly communities. This process of semiotic abduction can foster mechanism drift, compromise the robustness of theories, and ultimately fragment scientific conversations across subfields.

A central reason why mechanism drift is epistemologically problematic is that it can generate cumulative distortions in the development of theory. As theoretical mechanisms are reused across studies without empirical validation, they begin to serve as unexamined anchors, leading to the construction of increasingly complex theoretical frameworks with multiple predicted relationships. These frameworks may gain legitimacy through internal logical consistency, but if they are built upon assumed, but empirically unverified, mechanisms, they risk creating a cascade of *false positives*. That is, theories may appear to perform well in empirical models while resting on mechanisms that have never been substantiated. Over time, this can erode the falsifiability of theoretical claims, weakening the explanatory power of the theory.

Equally concerning is the risk of *false negatives*. As scholars build upon inherited mechanism structures, the field may become path dependent, reinforcing established lines of inquiry while excluding alternative mechanisms that are potentially valid but do not align with the prevailing theoretical narrative. This localized, myopic search process (Levinthal and March, 1993) narrows the field’s theoretical vision, reducing openness to novel mechanisms, and thereby stifling innovation. This is precisely where our *Counterpoint* departs significantly from the *Point* paper. We contend that, under certain conditions, abductive theorizing may in fact reduce theoretical creativity through semiotic abduction. These concerns resonate with recent calls to improve the robustness and transparency

of theorizing in management research. As Cornelissen and Werner (2025) argue, mechanisms are not functional narrative elements; they are in their highest form causally structured entities. When mechanism drift occurs, this foundational expectation is undermined. Thus, while the proliferation of theories and mechanisms in management research may suggest a healthy pluralism, semiotic abduction often leads to a very different reality: a landscape of separated theoretical trajectories, each anchored in its own taken for granted mechanisms and often disconnected from others despite addressing similar phenomena. In such cases, pluralism becomes nominal rather than generative.

It is important to emphasize that our argument is not a rejection of Fleming and Oswald's (2025) account of loosely coupled abduction. On the contrary, we view semiotic abduction as a potential *unintended consequence* of the very strengths they highlight, particularly the reliance on informed consensus as a marker of plausibility. Our concern is that, without safeguards, this reliance may institutionalize unverified mechanisms, producing mechanism drift and epistemic fragmentation. Our recommendations, therefore, are not meant to replace or supplant the *Point's* framework, but to complement it. By embedding verification practices alongside consensus, we aim to preserve the creative value of loosely coupled abduction while reducing its risks of epistemic slippage.

To mitigate these risks, we offer three central recommendations. First, researchers should develop a broader agenda to actively test mechanisms (Giarratana, 2024), using techniques such as mediation analysis, boundary testing, or targeted empirical investigation. Given that empirical testing of mechanisms, actions, and outcomes rarely fits into a single paper, a critical first step is for authors to explicitly acknowledge the abductive nature of their theorizing, including the underdetermined nature of certain mechanisms. Transparent articulation of this uncertainty would enhance the credibility and evaluability of theoretical claims.

Second, scholars should adopt a more conscious and coordinated form of methodological pluralism. Quantitative approaches are well-suited to test causal relationships between *actions* (X) and *outcomes* (Y), while qualitative and experimental methods are better positioned to unpack the mechanisms that link the two. Scholars should avoid the common tendency to stretch quantitative evidence to claim mechanism validity, just as they should resist using qualitative studies solely to test X - Y relationships. Instead, a proactive integration of methods, across papers or research programs, can better capture the complexity of theorizing and reduce the risks of semiotic drift. This integration can be operationalized differently depending on the research approach. For quantitative, secondary data-based studies, we suggest the inclusion of sub-sample analyses and/or moderation analyses (i.e., heterogeneity tests) to assess whether the theorized mechanism operates as expected. For qualitative or experimental research, we call for explicitly gathering evidence that documents how the proposed mechanisms are enacted in practice. For mixed-method research, rather than integrating all components within a single study, we recommend adopting a deliberately sequential research agenda. This approach is particularly suited for doctoral research, where one study generates large-sample correlational evidence and a subsequent study offers an in-depth qualitative exploration of the underlying mechanism.

For example, a line of research examining employee turnover through the lens of pay equity might posit that identification with a social group is the primary mechanism underlying this theoretical explanation. A quantitative, secondary data-based study might

test whether the main relationship between pay equity (X) and turnover (Y) changes in significance within subsamples with a higher or lower likelihood of social identification presence, providing indicative, albeit not definitive, evidence supporting the mechanism. A qualitative study, by contrast, could explore how employees interpret and enact identification processes through interviews or ethnographic observation, investigating more directly the salience of identity in practice. A sequential mixed-methods approach may coordinate these efforts more systematically: one study maps large-scale associations and explicitly frames them as abductive evidence for social identification mechanisms, while a follow-up qualitative study builds on this foundation to trace the presence and operation of identification as a causal mechanism within specific organizational settings. It is important that researchers remain vigilant with regard to mechanism drift, especially when established theories are adapted to new empirical contexts. This vigilance can be supported by critical meta-analyses, comparative reviews, or special issues dedicated to surfacing and adjudicating competing mechanisms. Creating intellectual spaces where divergent mechanism-based explanations are explicitly compared, rather than simply coexisting in self-contained narratives, can help re-establish the empirical and logical grounding of theoretical claims.

Ultimately, addressing semiotic abduction is not merely a technical exercise; it is also a call to reflect on the social and communicative processes that shape the origin and development of management theories. As scholars, we must remain attentive to the fact that the legitimacy of theoretical mechanisms is not determined solely by logical soundness or empirical fit, but also by how meaning is constructed, established, and diffused within academic communities. By managing this dialogue more explicitly, we can foster a more cumulative, credible, and reflexive process of theory development in management research.

ACKNOWLEDGMENTS

This research was partially funded by the Spanish Ministry of Science and Innovation and the State Research Agency (AEI) under Grant No. PID2022-136532NB-I00 (MCIN/AEI/<https://doi.org/10.13039/501100011033/FEDER>, UE). The authors are grateful to the editors of the Journal of Management Studies for their valuable guidance and to participants at the 2021 DRUID Conference, the 2025 Academy of Management Meeting Symposium 'Crossing Methodological Boundaries: The Impact of Abductive Logic in Management Studies,' and the IE Business School Brown Bag Seminar for their helpful feedback. The authors also thank Stefano Brusoni, Gideon Markman, Elena Dalpiaz, Matthew Grimes, Ammon Salter, Stratos Ramoglou, Luis Diestre, and Tommaso Ramus for insightful comments on earlier versions of this paper.

REFERENCES

- Agarwal, R. and Hoetker, G. (2007). 'A Faustian bargain? The growth of management and its relationship with related disciplines'. *Academy of Management Journal*, **50**, 1304–22.
- Beall, J. C. (2010). *Logics: The Basics*. Milton Park: Routledge.
- Behfar, K. and Okhuysen, G. A. (2018). 'Discovery within validation logic: Deliberately surfacing, complementing, and substituting abductive reasoning in hypothetico-deductive inquiry'. *Organization Science*, **29**, 323–40.
- Birkinshaw, J., Healey, M. P., Suddaby, R. and Weber, K. (2014). 'Debating the future of management research'. *Journal of Management Studies*, **51**, 38–55.

- Bitektine, A. (2008). 'Prospective case study design: Qualitative method for deductive theory testing'. *Organizational Research Methods*, **11**, 160–80.
- Colquitt, J. A. and Zapata-Phelan, C. P. (2007). 'Trends in theory building and theory testing: A five-decade study of the Academy of Management Journal'. *Academy of Management Journal*, **50**, 1281–303.
- Cornelissen, J. P. and Durand, R. (2014). 'Moving forward: Developing theoretical contributions in management studies'. *Journal of Management Studies*, **51**, 995–1022.
- Cornelissen, J., Höllerer, M. A. and Seidl, D. (2021). 'What theory is and can be: Forms of theorizing in organizational scholarship'. *Organization Theory*, **2**, 1–19. <https://doi.org/10.1177/2631787211020328>.
- Cornelissen, J. P. and Werner, M. (2025). 'What are mechanisms? Ways of conceptualizing and studying causal mechanisms'. *Organizational Research Methods*, **0**, 1–30. <https://doi.org/10.1177/10944281251318727>.
- Durand, R. and Vaara, E. (2009). 'Causation, counterfactuals, and competitive advantage'. *Strategic Management Journal*, **30**, 1245–64.
- Eco, U. (1979). *A Theory of Semiotics*. Bloomington, IN: Indiana University Press.
- Fleetwood, S. (2004). 'An ontology for organisation and management studies'. In Fleetwood, S. and Ackroyd, S. (Eds), *Critical Realist Applications in Organisation and Management Studies*. London: Routledge, 27–54.
- Fleming, P. and Oswick, C. (2025). 'Advancing abductive theory building: Balancing creative curiosity and programmatic rigour through 'Loosely Coupled Abduction''. *Journal of Management Studies*, <https://doi.org/10.1111/joms.70034>
- Gergen, K. J. (1999). *An Invitation to Social Construction*. London: Sage.
- Giarratana, M. S. (2024). 'Endogeneity and causal attributions in management research: Some reflections and proposals'. *European Management Review*, **21**, 3–8.
- Golden-Biddle, K. (2020). 'Discovery as an abductive mechanism for reorienting habits within organizational change'. *Academy of Management Journal*, **63**, 1951–75.
- Habermas, J. (1971). *Knowledge and Human Interests*. London: Beacon Press.
- Hansen, H. (2008). 'Abduction'. In *The Sage Handbook of New Approaches in Management and Organization*. London: SAGE Publications Ltd, 454–63.
- Heckman, J. J. and Singer, B. (2017). 'Abducting economics'. *American Economic Review*, **107**, 298–302.
- Josephson, J. R. (2000). 'Smart inductive generalizations are abductions'. In Flach, P. A. and Kakas, A. C. (Eds), *Abduction and Induction*. Dordrecht: Springer, 31–44.
- Katz, J. J. and Fodor, J. A. (1964). *The Structure of Language*. Englewood Cliffs, NJ: Prentice-Hall.
- King, A. A., Goldfarb, B. and Simcoe, T. (2019). 'Learning from testimony on quantitative research in management'. *Academy of Management Review*, **46**, 465–88.
- Levinthal, D. A. and March, J. G. (1993). 'The myopia of learning'. *Strategic Management Journal*, **14**(S2), 95–112.
- Lewis, D. K. (1969). *Convention: A Philosophical Study*. Cambridge, MA: Harvard University Press.
- Miller, K. D. and Tsang, E. W. (2011). 'Testing management theories: Critical realist philosophy and research methods'. *Strategic Management Journal*, **32**, 139–58.
- Mithani, M. A. and Kocoglu, I. (2024). 'Idea generation in abductive thinking: not one but three approaches'. *Academy of Management Review*, **49**(2), 451–4.
- Ormerod, R. J. (2009). 'The history and ideas of critical rationalism: The philosophy of Karl Popper and its implications for OR'. *Journal of the Operational Research Society*, **60**, 441–60.
- Oswick, C., Fleming, P. and Hanlon, G. (2011). 'From borrowing to blending: rethinking the processes of organizational theory-building'. *Academy of Management Review*, **36**, 318–37.
- Peirce, C. S. (1955). 'Abduction and Induction'. In Buchler, J. (Ed), *Philosophical Writings of Peirce*. New York: Dover Publications, 150–6.
- Popper, K. (1959). *The Logic of Scientific Discovery*. London: Routledge.
- Sætre, A. S. and Van de Ven, A. (2021). 'Generating theory by abduction'. *Academy of Management Review*, **46**, 684–701.
- Shaw, J. D. (2017). 'Advantages of starting with theory'. *Academy of Management Journal*, **60**, 819–22.
- Simon, H. A. (1962). 'New Developments in the Theory of the Firm'. *The American Economic Review*, **52**, 1–15.
- Suddaby, R., Hardy, C. and Huy, Q. N. (2011). 'Where are the new theories of organization? Introduction to the special topic forum'. *Academy of Management Review*, **36**, 236–46.
- Whetten, D. A., Felin, T. and King, B. G. (2009). 'The practice of theory borrowing in organizational studies: Current issues and future directions'. *Journal of Management*, **35**, 537–63.
- Yayavaram, S. and Ahuja, G. (2008). 'Decomposability in knowledge structures and its impact on the usefulness of inventions and knowledge-base malleability'. *Administrative Science Quarterly*, **53**, 333–62.