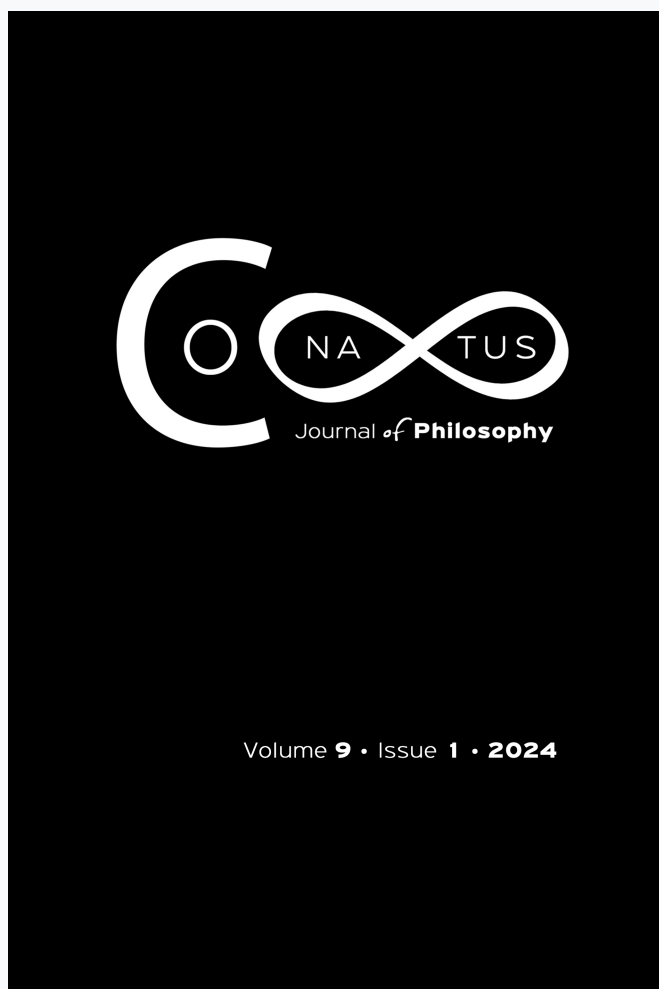


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### The Nature of Historical Research and Scientometric Methodology

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# The Nature of Historical Research and Scientometric Methodology

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### Abstract

*Historiography regularly encounters a crisis. This is mainly due to methodological reasons. History is not a representation of the past based on some archival materials because, firstly, the past is not available, secondly, the past, and therefore the present and the future, cannot be thought anew, and the historical research will not find new facts. New methods are needed to rethink the idea of the past. Recently, indicators of the development of science are in academic journals. Therefore, their analysis will allow through comparison to highlight the lacks of the historiography's current state and identify the perspectives of their correction.*

**Keywords:** history; historiography; scientometrics; criterion of science; method; methodology

## I. Introduction

Historical studies have a number of difficulties due to the nature of the subject. From an ontological point of view, it is assumed that history exists as a unique reality. But from the epistemological side, it is obvious that history is not given in experience, and its existence depends on its recognition. These perspectives are certainly mutually conditioned: to recognize history firstly it must exist, but its existence becomes clear only after recognition. The superiority of any of these is rather a matter of tradition (one can talk about the Greek-ontological and German-epistemological traditions) than rational justification, as the corresponding arguments can be put for-

ward in favor of both options. This reminds one of the debates about the notion of *truth*, the purpose of which was to find out whether it was connected with reality, the world, or human consciousness.

## II. History beyond subjectivity and objectivity

It has been shown in Hegelian and post-Hegelian philosophy that the world and consciousness are unthinkable separately and the most accurate observation, perhaps, belongs to Schopenhauer. He noticed: "And yet the existence of this whole world remains for ever dependent on that first eye that opened, were it even that of an insect."<sup>1</sup> Similarly, the actual existence of history derives from the consciousness that records it. If there is no evidence for the existence of history, then there is no history itself. In this sense, it is brought sometimes to notice that there was no history, for instance, in Ancient Greece, because there was no awareness of history as an independent existence yet. But on the other hand, the eye is not able to notice, understand the world as a whole. The idea of integrity implies mental work.

It turns out that the look of history discovered by consciousness is conditioned by the possibilities and limits of consciousness itself. Because the existence of history *in general* is at least controversial, we are always dealing with the history formed in *private* consciousness. And in this regard, perhaps, it would be more precisely to entitle the study, for example, not 'The rural history of Rome,' but 'What we know of the rural history of Rome.'<sup>2</sup> Deepen into the observation one step further, we have to ask: Where and how is the discourse about such a history formed? How is it that from the distance of centuries some consciousness begins to think of Roman life as history? What quality does the consciousness acquire that from then on perceives the world historically? If consciousness itself were historical, the world would be perceived historically from the very beginning, and historiography would be appreciated not only in Europe but also in the Ancient World. This means that consciousness is neither historical nor non-historical as such, for history never appears before consciousness in a ready-made form. The existence of history is a voluntary decision *to historicize* reality based on the past given in memory, and look at the world from this point of view. This circumstance gives grounds to assert that "History

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<sup>1</sup> Arthur Schopenhauer, *Die Welt als Wille und Vorstellung* (Leipzig: Erster Band, 1859), 35-36.

<sup>2</sup> Paul Veyne, *Writing History: Essay on Epistemology*, trans. Mina Moore-Rinolucchi (Middletown, CT: Wesleyan University Press, 1984), 16.

is a bookish, not an existential, notion,”<sup>3</sup> that is, there is no history as a phenomenon in the inner world, it is the result of mental work. Moreover, ‘bookish’ here should not be taken literally, because in that case the problem of the conditional ‘first man’ will arise: who first came up with the idea of history? It is obvious that this question is false. There is no answer to it, because the formation of history is not an instantaneous leap, but the result of consistent and careful mental activity.

Paradoxically, following the emergence of the concept of history, consciousness directs its efforts towards distancing itself from this concept. It behaves not as the originator of the idea but merely as its perceiver. What has been said refers more to the private, individual consciousness, which, knowing about history from the book, does not even notice its controversial nature. Consciousness, ignoring its active participation in every possible way, tries to give an *objective* character to history, and accordingly tries to guide the historian to be *impartial*. At that, this is the phenomenological part of the question, i.e. spontaneously-occurring. According to Ricoeur: “We expect history to have a certain objectivity - the objectivity which is proper to it: this, rather than subjectivity, must be our point of departure”<sup>4</sup> for otherwise historical knowledge needs a special justification. Of course, here we are not talking about objectivity of natural science, since nature, unlike history, still manifests itself somehow and is subject to the perception of experience. However, if history is not objective, that is, if it is not methodologically developed with common thinking in such a way that it can be passed on to others and augmented, then its general necessity must be demonstrated.

Putting aside the fact that all knowledge is formed in the psyche, and therefore necessarily has subjectivity, as well as ignoring the often encountered political orientation in this area, from this point of view it is necessary to emphasize the difference between historical cognition and other types of cognition. Natural sciences filter knowledge out of the subjective element as much as possible by testing the hypotheses or guesses. In history there is no field of experience, and so the question is how to verify the supposed reconstructed history, how will it be confirmed or refuted, what will or will not fit the history presented, and therefore what makes it a science, how will its achievements be measured. Historiography is a source-based discipline, so the main testing ground is historical sources themselves: the relevance of history

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<sup>3</sup> Ibid., 72.

<sup>4</sup> Paul Ricoeur, *History and Truth*, trans. Charles A. Kelbley (Evanston, IL: Northwestern University Press, 1965), 21.

is compared not with the past, but with the sources. Still, there are at least two, so to speak, open questions here. Firstly, in the 60s and 70s of the last century, the methodology of Popper-Lakatosian science had already shown that the facts have a theoretical weight, and no single fact can prove or disprove the hypothesis, because the latter can endlessly justify itself with ad hoc theories. In the same way, a bare source cannot be the standard for history, all the more, if we add a second consideration, that is, historiography has the intention of going beyond the sources. Rather, historiography aims to fill the gaps between sources, which are not events per se, and they cannot be written in the sources. In other words, the historiography or narrative is not traceable to the given realities, and so does not exclude the possibility of another history. Historical material, which constitutes the subject matter of historiography, does not guarantee the objectivity of cognition.

In terms of the historian's mental abilities, things are no better, because historical memory is also unverifiable. The subject of memory does not notice the change in its contents.<sup>5</sup> It is self-referential: when forgetting, the subject also forgets the forgetting itself. And the consciousness doesn't notice that at all. And in the case of mediated or critical historiography, that is, when there is no direct problem with memory, however, there is a need for narration, which implies interpenetration of the past and present periods. One of the complications in cognition of history is due to the difficulty or inability of going beyond its own time and context, which is especially known from psychoanalysis:

Every time anyone describes anything past, even if he be a historian, we have to take into account all that he unintentionally imports into that past period from present and intermediate times, thereby falsifying it.<sup>6</sup>

Such distortions are uncorrectable, as the past, independent of the present, is inaccessible. In this respect, the objective existence and recognition of a common history or History with a capital letter becomes highly disputed. It turns out that history is rather an unavailable transcendental idea, that cannot be written and completed,<sup>7</sup> because historical reality has different layers, which sometimes do not converge.

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<sup>5</sup> Davit Mosinyan, "History and Memory," *Wisdom* 11, no. 2 (2018): 66-70.

<sup>6</sup> Sigmund Freud, *Introductory Lectures on Psycho-Analysis*, trans. Joan Riviere (London: Allen & Unwin, 1923), 282.

<sup>7</sup> Veyne, 26.

Depending on the historiographer's viewpoint, this or that layer may emerge. History has a problem of reproducing what happened, which means that it strives not for accuracy, but for truth. From this it is sometimes concluded that there is no historical method, because the task is only to present what happened, in whatever way.<sup>8</sup> However, in this case, an important problem of demarcation of history arises: How to determine the role of history in the knowledge system? What is the relationship between history and art? In the modern world, this is primarily visible from scientific journals and articles published.

Such problems of the methodology of science cannot be solved only on a theoretical level. The socialization of life has also led to the socialization of science, as a result of which science is perceived, first of all, as a social institution. What has been said is gradually more relevant for historiography because it willingly or unwillingly has political connotations. This means that historiographical issues are not only methodological or, more precisely, historiographical methodology is not simply a matter of rational decision. In the 70s and 80s of the last century, a number of methodologists had already shown that the issue of choosing a hypothesis is not satisfied only by rational arguments. Especially in the humanitarian sphere, scientific goals are axiological in nature, therefore "Methodology gets nowhere without axiology."<sup>9</sup> Moreover, values and goals differ not only spatially, but also in terms of time. That is, even if we proceed from the fact that the main goal of science has always been and remains knowledge, we must bear in mind that knowledge can be different: in one case the advantage may be given to theoretical, in another to practical knowledge, in one case it is necessary to solve as many problems as possible, in another to discover new facts, etc. Taking into account the comprehensive picture of historical research, it will be possible to understand the main trends of knowledge and the main challenges methodology face. Scientific journals are the tool that can provide a basis for the formation of a general idea.

In this context, this work is an attempt to discuss whether modern scientometric methodology can show, or at least highlight the place and role of history as a unique scientific direction in the general spectrum of sciences, and to what extent this point of view can coincide with existing ideas. The methodological approach put forward in the framework of this work, which combines traditional methods with

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<sup>8</sup> Ibid., 12.

<sup>9</sup> Larry Laudan, "Progress or Rationality? The Prospects for Normative Naturalism," *American Philosophical Quarterly* 24, no. 1 (1987): 29.

scientometric data and methods, is rather an invitation to specialists interested in this field to start a debate-discussion on scientometric methodology in terms of its introduction into the field of traditional methodological approaches to study historiography

Therefore, the most important achievement in this regard will be that in any solution to the above-mentioned debate, one more tool will be added to the methodological arsenal aimed at revealing and documenting the peculiarities of historiography, the use of which in the present-day technological development seems to us very promising.

### III. Scientific databases as the basis of scientometric methodology

There are 27 categories in Scopus that distinguish scientific journals 'Agricultural and Biological Science,' 'Arts and Humanities,' 'Biochemistry,' 'Genetics and Molecular Biology,' 'Business,' 'Management and Accounting,' 'Chemical Engineering,' 'Chemistry,' 'Computer Science,' 'Decision Sciences,' 'Dentistry,' 'Earth and Planetary Sciences,' 'Economics,' 'Econometrics and Finance,' 'Energy,' 'Engineering,' 'Environmental Science,' 'Health Professions,' 'Immunology and Microbiology,' 'Materials Science,' 'Mathematics,' 'Medicine,' 'Multidisciplinary,' 'Neuroscience,' 'Nursing,' 'Pharmacology,' 'Toxicology and Pharmaceutics,' 'Physics and Astronomy,' 'Psychology,' 'Social Sciences,' 'Veterinary.'<sup>10</sup>

In this series, we are interested only in the category 'Arts and Humanities,' since the journal 'Egypt and the Levant' is registered here, through the study and comparison of scientometric indicators of which we will try to understand the distinctive features and characteristics of the journals in the field of History. The category 'Arts and Humanities,' in turn, is divided into 14 subcategories: 'Archeology (arts and humanities),' 'Arts and Humanities (miscellaneous),' 'Classics,' 'Conservation,' 'General Arts and Humanities,' 'History,' 'History and Philosophy of Science,' 'Language and Linguistics,' 'Literature and Literary Theory,' 'Museology,' 'Music,' 'Philosophy,' 'Religious Studies,' 'Visual Arts and Performing Arts.' The periodical 'Egypt and the Levant' is registered in the 'History' subcategory, and in our view, in terms of content, it is quite close to the periodicals registered in the 'Archeology (arts and humanities),' 'Arts and Humanities (miscellaneous),' 'General Arts and Humanities,' 'Visual Arts and Performing Arts' subcategories. In this study, there was also an attempt to conduct a comparative line with

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<sup>10</sup> This and all subsequent information is taken from <https://www.scopus.com/> and is based on the latest updates as of June 2022.

journals registered in the other 9 subcategories of the category ‘Arts and Humanities,’ however very cursorily, as it requires much wider and deeper research.

#### IV. Scientometric comparison of journals in the field of History with journals in related fields

One of the scientific innovations of the 20<sup>th</sup> century was scientometrics. And if in the field of natural science research it was quickly localized and began to work as a methodology, then in the social and humanitarian field, scientometrics as a criterion for the qualitative assessment of scientific works began to face various obstacles.<sup>11</sup> Here one could try to substantiate the differences between qualitative and quantitative assessments, point out their specific manifestations, talk about the impossibility of purely quantitative assessment of social and humanitarian studies, but within this research we intend to focus more on highlighting the special nature of the study of History and to show that the peculiarity of studying History is not confined only to the boundaries of its content features. History, with its subjectivity and unattainable transcendence, as a cognitive unit, acquires a special position when applying scientometric methodology.<sup>12</sup>

Let's start by describing an episode. ‘Egypt and the Levant’ journal ranks 364<sup>th</sup> among the 1500 Scopus journals registered in the field of History. It is noteworthy that the Sitescore of measurement unit assigned to this journal for 2021 had a 0.6 numeric value, and that was enough for it to take a place in the honorable first quarter. In the context of an extreme comparison, let's say that the journal ‘Biochimica et Biophysica Acta – Molecular and Cell Biology of Lipids’ of the field of ‘Molecular biology’ has been placed only in the 2<sup>nd</sup> quarter among the same field's journals registered in Scopus, taking the 104<sup>th</sup> position among 335 periodicals. While agreeing that this example is quite extreme, as it deals with journals representing fundamentally different fields, nevertheless we would like to emphasize that in a condensed form it shows an obvious contrast in a certain sense – the compressed image of the History as a scientific discipline with natural science knowledge and its gnoseological value presented in a rather fa-

<sup>11</sup> Ashot Gevorgyan, “Scientific Journals as a Standard of Sciencability,” *Wisdom* 19, no. 3 (2021): 30-34.

<sup>12</sup> Ashot Gevorgyan, “The Role of Scientometric Indicators in Modern Scientific World,” *Wisdom* 8, no. 1 (2017): 6-10.



vorable aspect from the point of view of scientometric methodology.<sup>13</sup> Let's note that the mentioned compressed image does not look at all in favor of History, if we consider it in the context of the logic of scientometric methodology. It is no coincidence that in the Web of Science database the Impact Factor for humanitarian journals, publications and authors, is not calculated at all.

Next, the comparison of periodicals representing History with other journals of the humanitarian sphere is considered (this applies only to comparison with journals registered in above mentioned 'Archeology (arts and humanities),' 'Arts and Humanities (miscellaneous),' 'General Arts and Humanities' and 'Visual Arts and Performing Arts' subcategories. The first field that seems to be close to historical knowledge in terms of its cognitive features is Archaeology, so it is appropriate to consider the comparative picture of journals precisely in these fields. However, at the very first sight, it becomes obvious that the journals registered in the scientific field of Archeology also differ from the journals presenting History in terms of scientometric methodology. The 'Midcontinental Journal of Archaeology,' for which Scopus calculated a CiteScore with a numerical value of 1.1, ranks 85<sup>th</sup> among 335 archeology journals, and is in the second quarter. This can be explained by the fact that modern archeology, using its numerous methods, partly approaches the field of natural science knowledge, therefore, this circumstance further strengthens our convictions of the value of historiography as a special field.<sup>14</sup>

We capture a much more interesting picture when we consider journals of the subject category including mixed fields of the Humanitarian sphere. Here, for example, the journal 'L'Encephale' is in the second quarter, despite having a CiteScore with a numerical value of 3.2. Such a picture can be even in the subcategories of Natural science field, however, as we see, when humanitarian research journals fall outside the established humanitarian categories, in fact, according to the scientometric methodology, they are getting closer to the field of Natural sciences than, let's say, to History.

It reminds us of the observed pattern in the field of General Arts and Humanities, but here again we have a different result. In particular, 'OBETS' journal, having the same CiteScore with a numerical value of 0.6, was positioned in the second quarter. It's the same with the 'History of Humanities' journal. Only one reservation – 'OBETS' is registered

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<sup>13</sup> Yeranuhi Manukyan, "Camus' Understanding of the Paradoxically Multidimensional Human Being," *Wisdom* 3, no. 2 (2022): 137-143.

<sup>14</sup> Johan Heilbron and Nico Wilterdink, "Studying Long-Term Processes in Human History," *Historical Social Research* 48, no. 1 (2023): 7-34.

also in the 'Social Humanities' Journal Database, while 'History of Humanities' is located only in the database of the Humanitarian field, and perhaps this can explain the higher status of 'OBETZ' in previous years.

In Scopus, only the 'Visual Arts and Performing Arts' subcategory is close to "History" subcategory in terms of scientometric parameters. But one interesting observation - the vast majority of journals in this field have the term 'history' in their title or are very close in their focus to journals publishing historical content: 'Art History,' 'Acta Historiae Artis Slovenica,' 'International Journal of African Renaissance Studies,' 'Journal of African Cinemas,' etc. And this suggests that the content published in journals of this subcategory if even it is not a historiographical, then it is very close to them, and hence all of the above applies to these journals as well.

Let us take a brief look at the comparison in other subcategories. In particular, in the 2<sup>nd</sup> quarter in "Classics" subcategory there are even journals that have a CiteScore with a numeric value of only 0.3. Interestingly, the 3<sup>rd</sup> quarter begins with journals having a CiteScore with a numeric value of 0.2.

Journals in the "Conservation" subcategory are quite few, and perhaps that is why Scopus does not provide its own list for journals of this category, and in the mixed list with other categories we see that a journal having a CiteScore with a numeric value of 0.5 is ranked in the 2<sup>nd</sup> quarter, and the next journal with a CiteScore with a numeric value of 0.2 is already in the 3<sup>rd</sup> quarter.

A CiteScore with a numeric value of at least 0.7 was required for journals to rank in the 2<sup>nd</sup> quarter in 'History and Philosophy of Science' subcategory, whereas a minimum numerical value of 0.4 was sufficient in 'Philosophy' subcategory.

Yet in order to find a place in the 2<sup>nd</sup> quarter in 'Religious Studies' subcategory, a CiteScore with a numerical value even of 0.3 was enough for the journals.

A CiteScore with a numerical value of 0.5 in the 'Language and Linguistics' subcategory is the minimum threshold that journals must overcome to get into the 2<sup>nd</sup> quarter, whereas a CiteScore with a numerical value of 0.2 was sufficient in the 'Literature and Literary Theory' subcategory.

In 'Museology' and 'Music' subcategories, journals with a CiteScore of 0.4 have found a place in the 2<sup>nd</sup> quarter.

## V. The special place of journals in the field of historical theory among scientific journals

Continuing the discussion of the issues raised above, we believe that it is time to talk about the scientometric characteristics of journals repre-

senting the field of historical theory. We have identified three journals: *Rethinking History* (ISSN: 1364-2529), *History and Theory* (ISSN: 0018-2656) and *Journal of the Philosophy of History* (ISSN: 1872-2636). All of these journals are leaders in the mentioned fields and are in the first quarter of the SCOPUS database. Even a superficial analysis of the articles published by the three journals and the references made to them shows that the publications of this field, despite sometimes quite a large number of downloads / readings of the articles, have a rather small number of references for a long time (on average 5-10 years). When we consider the most cited articles in the journals mentioned, it is striking that the most cited articles are mostly 15-20 years old. The so-called 'young' articles that fall out of this scheme, but have a large number of references, are articles 5-10 years old. Journals that count the most cited articles for the past years (3-5) show in practice how small the number of references is, even with a sufficient number of downloads / readings. While agreeing with all the statements that it is quite difficult to calculate the citations to the journals in the humanitarian sphere,<sup>15</sup> and primarily because citations here usually begin to appear after 5-10 years, and sometimes even later, we want to emphasize that journals in the field of historical theory, being at the intersection of history and philosophy, seem to be doubly subject to this pattern, and thus need special attention and careful study. We believe that further discussions and research programs on this issue will contribute to the process of highlighting the scientific potential of the field and clarifying methodological approaches.

## VI. Conclusion

History has certain characteristics that make it difficult to categorize and measure its achievements. Unlike the natural sciences, a new methodology is necessary here to outline the development and discover new horizons. The scientometric methodology also comes to confirm the point of view, that history, as a discipline, holds a special place and role in the complete palette of scientific research. The study of history and historiography as disciplines from the point of view of the methodologies considered within the framework of this research gives a reason for hope that further, more detailed studies should reveal much more tangible features, that in the context of narrow tasks of the research, did not find a place within the framework of this study. In particular, it is possible to

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<sup>15</sup> Mario De Marchi and Edoardo Lorenzetti, "Measuring the Impact of Scholarly Journals in the Humanities Field," *Scientometrics* 106 (2016): 253-261.

observe more thoroughly, for example, all the journals registered in the Scopus “History” subcategory, or at least a significant part of them, in terms of the content of published articles, and understand to what extent the content, thematic focus affects the quantitative transformation of scientometric indicators.

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