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Introduction: Into the Fourth Decade

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Introduction: Into the Fourth Decade

Royston Greenwood, Christine Oliver, Thomas B. Lawrence and Renate E. Meyer

The first edition of this *Handbook* appeared in 2008.[1] Its contents and introductory chapter covered the evolution of institutional thinking from 1977 up to that date. In the introductory chapter of the second edition, we will not repeat nor reinterpret these three decades, but rather expand on what we see as important directions and developments in institutional theory since then and suggest what we regard as the most promising future research avenues.

Most of the themes identified in the first edition continued to be elaborated into the fourth decade, and the foundational concepts, notably legitimacy (see Deephouse, Bundy, Tost, & Suchman, Chapter 1) and organizational field (see Wooten & Hoffman, Chapter 2), remained core components of conceptual and empirical work. Both these chapters show the continuing elaboration and centrality of these concepts. However, in mapping the developments of this fourth decade, we find two overarching yet interrelated themes (which form Parts II and III) to have become particularly central during the post-2008 era: first, a renewed interest in the complexity of relationships between organizations and their institutional context; and, second, a focus on processes and practices through which institutions are created, enacted, or altered, or through which they erode and are eventually deinstitutionalized. Running through both themes are conversations around the concepts of institutional logics and institutional work and related theorizing on the nature of agency within institutional theorizing. In addition, this fourth decade saw the emergence of several new conversations that elaborated and deepened institutional theorizing. Much is going on in the big 'institutional tent'!

However, if there is one area that distinguishes research over the last decade from earlier trends and that promises to redirect institutional scholarship, it is the attention being given to outcomes and consequences of institutions. Whereas earlier work

directly or indirectly regarded the primary consequence of institutional processes rather abstractly as the accomplishment of legitimacy or the associated implications of field-level isomorphism, today concrete and significant societal outcomes – such as racial discrimination, inequality, organizational corruption, or environmental sustainability – are vying for centre stage.

ORGANIZATIONS AND THEIR CONTEXTS

In the last decade, scholarly interest in the relationship between organizations and their institutional context has taken three primary routes: one elaborates the nature of contextual features such as field-level governance structures, forms of community, and globalized contexts; a second gives emphasis to patterns of compliance – especially non-compliance – and the play of 'legitimacy management'; the third, and lesser developed, focuses upon the world of legitimacy conveyors and upon how legitimacy judgements *per se* are socially constructed.

Field-Level Features and Governance

One way in which features of the context are addressed is through field-level infrastructures and governance arrangement. Such aspects have figured to a greater or lesser degree throughout the development of institutional theorizing (see Hinings, Logue & Zietsma, Chapter 6; Aldrich & Fiol, 1994), but it is only recently that they have received more explicit and systematic treatment. An important contribution is Lampel and Meyer's (2008) notion of 'field-configuring events' (FCEs). The term embraces events and actors such as trade shows, tournaments, festivals, ceremonies and rituals, accreditation exercises, rankings, and conferences, which collectively represent 'an important and understudied mechanism shaping the emergence and developmental trajectories of technologies, markets, industries, and professions' (Lampel & Meyer,

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2008: 1025). FCEs are not an entirely new idea – they are found in earlier studies – but Lampel and Meyer correctly suggest that giving more focus to FCEs should enhance our understanding of field dynamics because they are integral to 'the growth and evolution of institutional, organizational, and professional fields' (2008: 1025).

As Hinings et al. (Chapter 6) point out, the need to understand the nature and outcomes of FCEs for field structuration has, over the past few years, become more fully appreciated and various forms of FCEs have been studied (e.g., Garud, 2008; Hardy & Maguire, 2010; Moeran & Pedersen, 2011). They are recognized as important vehicles of field-level institutional governance that can profoundly shape how fields emerge, evolve, are displaced or sustained. They are also fundamental to how interests and privileges are asserted and concealed (Amis, Munir, & Mair, Chapter 27; Palmer, Chapter 28).

Nonetheless, questions remain. Schüssler, Rüling and Wittneben (2014), for example, argue that the role of FCEs in field structuration varies according to the relative maturity of the field. At the early moments of field evolution, these authors suggest, FCEs provide the basis for trust and openness and hence can assist change. As fields mature, FCEs become less open because powerful actors enter the discourse – and thus FCEs *prevent* change. We also have much to learn about less obvious FCEs. Although they do not use the term, Vaccaro and Palazzo's (2015) study of resistance to the mafia highlights a very different type of FCE. In their case it was not formal conferences but more clandestine meetings in places such as school buildings and activists' houses that provided the opportunity for normative changes that undermined deeply institutionalized arrangements. This study reminds us that not all FCEs are highly visible. We need to cast our net wider. Overall, however, whilst accepting that

we have much yet do to in order to fully understand the range and roles of FCEs, Hinings et al. (Chapter 6) conclude that progress is promising and encouraging.

Emphasis upon FCEs illustrates how institutional theory has homed in on the organizational field as the level at which sociocultural pressures are particularly evident. The overwhelming majority of studies now take for granted that the organizational field or environment is the appropriate level of analysis (see Wooten & Hoffman, Chapter 2). The concept of field originally developed because of dissatisfaction with the term 'industry', which neglects the role of agencies such as professional and trade associations, regulators, the media and the state. Recognizing and empirically focusing upon the field was, and remains, a crucially important and distinctive feature of institutional theorizing. Nevertheless, the concept of organizational field may have been considered unduly narrowly, and although it has proved, and will continue to be, a useful level of analysis, it may have become too abstract and thus divorced from the sociopolitical community within which institutional and organizational processes occur. Other levels of analysis have been much less considered. As Greenwood, Diaz, Li and Lorente (2010: 15) put it:

> Analytical abstraction, intended to better capture contextual influences, has resulted in a relative blindness to how communities (regions) and their interaction with state logics affect organizations. The relationship between communities and organizations, informed through an ideology of the state, was integral to early institutional work (e.g., Selznick, 1949), but that focus has largely disappeared. A return to the traditional emphasis on community would be timely.

Encouragingly, however, studies have begun to acknowledge that organizations are also located within communities and that these communities may influence the particular expression of rationalized myths and institutional logics to which organizations have to

respond (Almandoz, Marquis, & Cheely, Chapter 7; Marquis, 2003; Marquis, Glynn, & Davis, 2007; Marquis & Lounsbury, 2007). Illustrations of the significance of community are provided by Baum-Snow and Pavan (2013), who show how geography affects income inequality, Allard and Small (2013), who connect community to social disadvantage, or Peredo and Chrisman (2006), who link community to the formation of social enterprises, Marquis (2003), who traces the connections between organizations and cultural associations within a bounded geographical setting, and Greenwood et al. (2010), who demonstrate how connections between organizations and local political elites influence decisions on the utilization of human resources.

Höllerer, Walgenbach and Drori (Chapter 8) employ yet another lens to explore the relationship of organizations and their contexts by asking how the increasingly globalized world (see also Meyer, Chapter 32; and Scott, Chapter 33) impacts organizations, their features, forms, practices, and the available building blocks for their management and governance. These authors argue that organizations display different degrees of global (versus local) orientation and that their responses and compliance mechanisms are shaped by the degree to which they are globally oriented. They then go further, suggesting that understanding the co-constitutive interplay between the local and the global is necessary to understand processes and dynamics in and across organizations, communities, fields, and the global world society; and that this interplay has important consequences for central institutional concepts such as legitimation, translation, or the question of how plurality unfolds and organizations respond. Scott (Chapter 33: 862) sees the institutional study of the transnational realm as 'arguably one of the most vibrant areas of institutional theorizing and research'.

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Patterns of Compliance

Ever since Oliver (1991) introduced the idea of 'strategic responses' to institutional pressures there has been general acceptance that organizations are not 'passive receptors of legitimate ideas' (Gondo & Amis, 2013: 229). On the contrary, 'shades of rogueness' (Quirke, 2013: 1692) are accepted as part and parcel of all institutional contexts. In consequence, understanding why particular organizations engage in different patterns or forms of conformity, and how they do so, has become a rich focus for research. Moreover, recent accounts avoid the top-down imagery of earlier work, and the overly agentic bottom-up accounts that followed. Legitimacy management is very much seen as a complex process of reciprocal social construction (Boxenbaum & Jonsson, Chapter 3). Wedlin and Sahlin (Chapter 4: 103) carefully elaborate and remind us that the Scandinavian approach to diffusion always emphasized that ideas and practices 'do not remain unchanged as they flow but are subject to translation. […] To imitate, then, is not just to copy but also to change and to innovate'. This approach is much more appreciated now than earlier and has spurred many studies on such 'translations'.

Various patterns of compliance or non-compliance continue to be elaborated. Boxenbaum and Jonsson (Chapter 3) indicate and review the continuing interest in decoupling – the strategy identified by Meyer and Rowan (1977) as a response to inconsistencies between technical and institutional demands. This distinction is much less assumed today, in that assumptions of technical prerequisites are more usually seen as institutional; but the idea of inconsistent institutional prescriptions remains of interest and has, in the fourth decade, triggered much research into institutional complexity (Greenwood, Raynard, Kodeih, Micelotta, & Lounsbury, 2011). In this volume, such complexity is particularly elaborated in the study of 'global' and 'local'

dynamics (see Höllerer et al., Chapter 8) or 'hybrid' organizations (see Battilana, Besharov, & Mitzinneck, Chapter 5) – on which we say more later.

Before leaving decoupling, it is worth noting the disturbing study by Whitman and Cooper (2016), whose fieldwork revealed the connection between decoupling and systematic corporate social irresponsibility. These authors analysed how decoupling enabled an international firm 'to achieve certification for socially responsible corporate behavior alongside allegations of rape and irresponsible practices' (p. 116). As the acting editor for the paper commented, 'The paper […] is not for the faint of heart' (p. 115). For us, it is an exemplar of the shift within institutional theory towards problems that matter.

In studying patterns of compliance, the focus has shifted away from identification of responses *per se* (in the Oliver tradition), in favour of identifying the attributes or circumstances that shape responses to particular institutional expectations (Deephouse et al., Chapter 1). An established example of this interest concerns new ventures. Because these organizations lack legitimacy their responses to institutional expectations are geared towards attaining legitimacy by closely following established practices, or by attaching themselves in some way to high status actors (e.g., see David, Sine, & Serra, Chapter 25). Another, complementary stream of research explores how organizations that have suffered loss of legitimacy that arose from an association with other organizations, might seek to *regain* legitimacy either for themselves (e.g., Jonsson, Greve, & Fujiwara-Greve, 2009) or their industry (e.g., Desai, 2011).

Other studies have probed the filtering attribute of status, suggesting that middle-status organizations are less likely to deviate from institutional prescriptions as compared to high- and low-status organizations, because high status protects from

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social penalties, and low status renders them less relevant (Phillips & Zuckerman, 2001). A rather different take is offered by Compagni, Mele and Ravasi (2015) who show that central and peripheral organizations within a field might have very different reasons for adopting an innovation: central players may see an innovation as a threat and adopt it in order to preserve their status, whereas peripheral players might see adoption as an opportunity by which to improve their status.

A very different attribute that defines an organization and shapes its responses, and that is attracting considerable scrutiny, is 'stigma'. 'Stigmatized' organizations violate broader social norms (Ashforth, Kreiner, Clark, & Fugate, 2007; Devers, Dewett, Mishina, & Belsito, 2009; Hudson, 2008) and not only lack legitimacy – they are positively *ill*egitimate and vilified. Yet, some are capable of 'seemingly cheating their fates' (Hampel & Tracey, 2016: 2). How these organizations are able to do so is capturing much interest. Answers put forward include 'opacity' (e.g., Briscoe & Murphy, 2012), various forms of 'concealment' (e.g., Hudson & Okhuysen, 2009; Vergne, 2012), 'substitution' (Okhmatovskiy & David, 2012), 'dilution' (Carberry & King, 2012; Sharkey, 2014), 'distraction' (Grougiou, Dedoulis, & Leventis, 2016), 'asset divestment' (Durand & Vergne, 2015), or, paradoxically, even the deliberate 'use' of that stigma (Helms & Patterson, 2014; Tracey & Phillips, 2016). Put more simply, organizations respond to being stigmatized in one of three ways – they use it, lose it, or conceal it.

The fact that stigmatized firms can survive underlines that legitimacy processes involve multiple audiences that confer or deny legitimacy and that these audiences (or 'sources' to use Deephouse et al.'s term, Chapter 1) often differ in their social evaluations. As such, and as emphasized by Hudson and Okhuysen (2009), recent

studies – notably those focused upon 'hybrid organizations (see Battilana et al., Chapter 5) qualify and question the widely accepted definition of organizational legitimacy as a '*generalized* perception or assumption that the actions of an entity are desirable, proper, or appropriate' (Suchman, 1995: 574, emphasis added). Instead, legitimacy is a more complex interaction between organizations and their several audiences.

The Social Construction of Legitimacy Judgments

For the most part, studies of the legitimacy process assume the presence of social standards or criteria against which organizations and their behaviours can be assessed. In this portrayal, various legitimating agents -– such as regulators, 'intermediaries' (e.g., analysts), field-level 'collective actors' (e.g., industry and professional associations, accreditation agencies), or the media – convey, monitor and enforce social expectations of appropriate conduct. As Deephouse et al. (Chapter 1) observe, much has been learned about the role of these actors in stabilizing institutional arrangements.

Two especially compelling recent contributions to understanding of these processes are the attention given to categories (Durand & Boulongne, Chapter 24), and, even more recently, the role of emotions in expressing and enforcing institutional judgments (Lok, Creed, DeJordy, & Voronov, Chapter 22). For us, these elaborations have reinvigorated interest in the legitimation process, the first by providing a language through which to better capture the process, and the latter by identifying a previously missing yet profound dimension (on which more below).

However, Bitektine and Haack (2015) turn the spotlight upon our relatively modest understanding of the networks and relationships that connect these 'legitimacy evaluators' and our lack of insight into the means by which legitimacy standards and judgments are themselves socially constructed and policed *within* the world of this

community. In other words, although our appreciation of field-level governance mechanisms is growing both in scope and sophistication (Hinings et al., Chapter 6), and although the influence of these field-level actors and their often 'soft' governance for institutional stabilization and change is being recognized (Wedlin & Sahlin, Chapter 4), we need to probe much more inside their world in order to gain a better understanding of their working and consequences. Moreover, given – as we noted above – that the institutional context is not homogeneous, we suggest that understanding how the several worlds of social endorsement come together to socially construct institutional prescriptions and proscriptions, is an intriguing and important direction of future research.

INSTITUTIONAL PROCESSES

As we noted in the first edition, from the mid-1980s and through the 1990s there was considerable interest in showing patterns of diffusion, which were seen as indicators of institutional effects – especially of institutional isomorphism. That purpose – to 'prove' the institutional thesis by showing isomorphic tendencies under conditions of uncertainty – no longer holds, but interest in patterns of diffusion remains. So, too, does interest in a second process – institutional entrepreneurship – that was precipitated by DiMaggio's (1988) challenge for an explanation of institutional change.

Diffusion and Isomorphism

A core question of the institutional perspective concerns whether and to what extent organizations adopt similar structures and forms because they adapt 'to what they believe society expects of them'. The institutional explanation is that organizations become similar 'not through adaptation to an externally or technically demanding environment or through the "weeding out" of technical and social misfits, but through

adaptation to a socially constructed environment' (Boxenbaum and Jonsson, Chapter 3: 81). Given its early centrality to institutional accounts, it is not surprising that this theme has attracted '[v]oluminous research' which Boxenbaum and Jonsson interrogate around five questions: In what respect are organizations supposed to be similar? Does similarity result from mechanisms of diffusion? What is the relevant environment to which organizations are thought to become (or not to become) isomorphic? How does isomorphism occur where the institutional environment is not homogeneous? How can we account for dissimilarity?

What is notable from their review is that, although our understanding of these issues has significantly advanced, there are still many gaps and confusions. More recent research has begun to address what happens after adoption – to the practices that diffuse (e.g., Ansari, Fiss, & Zajac, 2010; Gehman, Trevino, & Garud, 2013) or the organizations (e.g., Weber, Davis, & Lounsbury, 2009), or how the adoption of practices influences future decisions depending on whether the practices enact the same or competing institutional logics (Meyer & Höllerer, 2016; Shipilov, Greve, & Rowley, 2010). There is, too, growing interest in how 'controversial or counter-normative' practices diffuse (or not). Nevertheless, Boxenbaum and Jonsson identify several additional areas that call for further work. But in doing so they raise a cautionary note, asking 'whether isomorphism still has a place as a distinct empirical concept'. They think that it does but point out that it requires much more careful theorizing in order to remove the current 'conceptual muddle' (Colyvas & Jonsson, 2011: 27). Time will tell!

Boxenbaum and Jonsson (2017: 93) make a more general and challenging point about the expansive nature of institutional theorizing. Noting that isomorphism and decoupling were initially put forward as related propositions, but have been treated as

separate constructs, these authors criticize how theory develops by expansion and in doing so loses some rigour: 'Instead of focusing on how core concepts relate to each other, researchers tend to extend and enrich each separate line of inquiry'. Food for thought …

Wedlin and Sahlin (Chapter 4) present an overview of the Scandinavian variant of institutional theorizing. They highlight how that approach has always emphasized that ideas are translated and edited as they diffuse and are adopted. They also observe that studies of 'what' diffuses are now more likely to focus upon 'soft' regulations such as standards, evaluations and audits (we in the university world can certainly verify this shift in our world!), often spreading on a global level (Meyer, Chapter 32). But Wedlin and Sahlin suggest that in the last decade there has been more interest in *how* ideas are carried. Early studies pointed to the importance of direct linkages – e.g., interlocking directorates – as vehicles by which organizations 'learn' about circulating ideas. The implication is that organizations to which an organization is directly connected act as models to be followed. Other studies pointed to cultural linkages – i.e., to the category with which an organization identifies – implying that organizations within that category are the appropriate models. Wedlin and Sahlin (see also, Glynn, Chapter 9) suggest that it is 'identification' and identity that are often found to be a key mechanism of imitation: organizations imitate 'those one relates to and those with whom one identifies' (p. 107).

Similarly, there is renewed interest in the range of institutional 'carriers'. Wedlin and Sahlin (Chapter 4) and Höllerer, Walgenbach and Drori (Chapter 8) provide insights into the role of 'carriers' in the translation of globally spreading forms and practices. Bringing some order to the study of how ideas diffuse, Scott (2014: 58) identifies four types of carriers – symbolic, relational, routines, and artifacts – and

suggests that each varies in the processes employed 'to transmit their messages' (Scott, 2014: 58). But for the Scandinavian approach it is not only the range of carriers that matters – also being sought is understanding of how and why different carriers affect how particular kinds of prescriptions and expectations are received and translated, the extent to which diffusing ideas generate contestation between carriers and promoters, and how those interpretive processes affect the subsequent deployment and practice usage.

Institutional Entrepreneurship and Change

Given the considerable effort devoted to understanding how and why institutional change occurs, it is not surprising that we are much more informed about from where and under what circumstances initiatives arise that prompt institutional disruption (Hardy & Maguire, Chapter 10). We have learned that it may follow from external 'jolts', the presence of endogenous contradictions, or through the incremental adjustments and improvisations that occur in the performance of day-to-day activities. We are also better informed about how new ideas are 'theorized', 'translated', or 'framed' so as to gain social endorsement and support. Insights from social movement theory continue to provide significant guidance (Schneiberg & Lounsbury, Chapter 11); more recently, so, too, has practice theory (Smets, Aristidou, & Whittington, Chapter 14) and identity theory (Glynn, Chapter 9).

Nevertheless, questions remain. Zietsma and Lawrence (2010: 190) conclude that studies that focus upon an organization's position within a field (e.g., whether 'central' or 'peripheral') as a predictor of the organization's openness to change 'have generated as many puzzles as answers'. Similarly, undue attention has been given to the discursive rather than the behavioral strategies deployed in the theorizing and mobilizing of

change efforts (Phillips & Malhotra, Chapter 15). In comparison, the 'non-discursive dimension' of mobilization 'remains the subject of scant research' (Battilana, Leca, & Boxenbaum, 2009: 86).

A different and critical question raised by Hardy and Maguire (Chapter 10), is whether analyses of institutional change are too centred around the 'paradox of embedded agency' (Holm, 1995) – i.e., the conundrum of how actors embedded within an institutionalized setting are able to reflect upon existing arrangements and perceive alternatives (which implies that they are located in a peripheral position within the field), and yet have the ability to marshal resources to accomplish fundamental change (which implies the opposite). Hardy and Maguire observe 'two different narratives […] one that is more actor-centric and focuses on the deliberate strategies of particular institutional entrepreneurs and another that is more process-centric and emphasizes the struggles associated with institutional entrepreneurship activities' (p. 273). Process studies, they note, have increased in recent years, and complement (some would say contradict) actor-centric accounts, which 'tend to be functionalist, painting a neat picture of relatively rational, linear, win–win problem solving activity' (p. 274).

A similar point has been pushed by other scholars (e.g., Hwang & Colyvas, 2011; Meyer, 2008; Powell & Colyvas, 2008). In his 'strategic action fields' approach, Fligstein (2013), for example, criticizes institutional accounts for their failure to properly acknowledge that even mature fields experience ongoing political struggles to sustain or alter patterns of interest and privilege (although see Scott, Chapter 33). A related but distinctive contribution to this debate is provided by Lawrence, Suddaby and Leca (2009), who, though giving less attention to political struggles, emphasize the importance of 'institutional work' as actors 'knowingly' seek to 'create, maintain, and

disrupt the practices that are considered legitimate within a field (practice work) and the boundaries between sets of individuals and groups (boundary work), and the interplay of these two forms of institutional work' (Zietsma & Lawrence, 2010: 189). Despite the growing understanding of how change occurs, and of the roles of various actors and events, questions remain. Few studies analyse failed efforts to change institutions. We also have limited understanding of how fields vary – the distinction between emerging and mature fields has been acknowledged, but there is little research, for example, on mature fields that lack a dominant logic. Nor do we have comparisons of different types of fields – such as highly professional fields with non-professional ones – or studies that compare fields that exhibit very different rhythms and sequences of change. Several years ago, Scott commented that 'although we have made headway in recent years […] we have much yet to learn' (2010: 11). We still do.

The Microfoundations of Institutions

DiMaggio and Powell (1991) pointed out that we know very little about how institutional prescriptions affect and are affected by individuals. Powell and Colyvas (2008) re-emphasized the point, recommending that more effort be given to uncovering the microfoundations of institutional processes. Although there has always been some kind of microfoundation for institutional research, the nature of those foundations has too often been left implicit in our work. In this volume, Powell and Rerup (Chapter 12) revisit this theme and stress that 'institutions are sustained, altered, and extinguished as they are enacted by collections of individuals in everyday situations' (p. 311) often 'born out of chance and naivete' (p. 332). This imagery contrasts with the more organized agency typically underpinning, for example, social movement accounts of institutional change. In their chapter, Powell and Rerup point to several literatures that speak to and inform analyses of micro-processes – including 'practice theory', the

Carnegie school, sense-making, and ethnography. All of these, Powell and Rerup show, have significant potential to uncover how individuals connect to broader, more macro, institutional processes, and to enrich our theorizing about stability and change.

At the core of institutional conceptions of social reality is the notion of meaning (see Zilber, Chapter 16). Although institutions have long been argued to represent particularly meaningful social structures and practices (Selznick, 1957), the degree to which meaning and meaningfulness have been a part of institutional studies of organizations has varied tremendously. As Zilber (Chapter 16) forcefully argues, attention to meaning has ebbed and flowed in institutional studies, playing a central role in early work, and then moving to the margins until it was picked up again in the 1990s and developed more explicitly as institutional scholars began to incorporate linguistic methods and theories. The role of language in conceptualizing and investigating institutions has flourished since the mid 2000s with scholars explicitly employing discursive, narrative, rhetorical and semiotic lenses (see Phillips and Malhotra, Chapter 15, and Jones, Meyer, Jancsary, & Höllerer, Chapter 23). Phillips and Malhotra tie this linguistic turn to recognition of the centrality of cognitive institutions, and argue, perhaps provocatively, for a separation of cognitive conceptions of institutions from what they suggest are less usefully understood as institutional normative and regulative pillars. Jones et al. (Chapter 23) challenge this exclusive linguistic focus with its cognitive preoccupation and argue for the inclusion of other semiotic modes of meaning construction.

'Practice theory' (Smets et al., Chapter 14) and the practice level of analysis have become particularly prominent in the study of microfoundations. The concept of a practice describes an 'embodied, materially mediated array[s] of human activity

centrally organized around shared practical understanding' (Schatzki, 2001: 11). In their chapter, Smets et al. point to the shared heritage of institutional theory and practice theory, but conclude that although ideas from the latter have recently received 'more attention', they have done so 'often in a more colloquial and unreflexive way to black box what people "do" without embracing the onto-epistomological assumptions underpinning practice theory' (p. 367). They elaborate how the practice approach could contribute more 'granularity' to current research themes, including questions of where and how change occurs, the nature of institutional work, the construction of institutional complexity, the role of practitioners as 'carriers' of ideas, and the play of emotions. The engagement of institutional and practice ideas holds much promise – maybe, at last, our declared interest in the microfoundations of institutional processes will resonate empirically and theoretically.

Wedlin and Sahlin (Chapter 4) recognize the similarity between Scandinavian institutionalism and recent 'practice' accounts of change and maintenance – especially the emphasis upon distributed improvisation and upon the 'mundane acts of translation performed by many' (p. 119). A difference between the two approaches is that practice theory does not foreground imitation as a driving mechanism – instead, improvisation arises from day-to-day, ongoing tasks. Both perspectives, however, spotlight the actual doing of work as the source of institutional adaptation and change.

Another lens by which to study micro-level institutional processes is provided by social network analysis. Powell and Oberg (Chapter 17) show how relational and institutional analyses can be brought together to offer deeper insights into how institutional patterns emerge, are maintained or changed. They start by reminding us that the classical notion of fields builds on inter-organizational networks and structural

equivalence and highlight how differences in the relational positioning impact innovativeness, speed of adoption, environmental complexity and the legitimacy of an organization. An emerging and very promising area analyses how the meaning of ideas, concepts, constructs, etc. is constructed through their relationship to other ideas, concepts, and constructs. Such semantic network analyses may not only offer new and more fine-grained insights into diffusion and translation (see below), they make visible the relational core of institutions as a typification of actor and action (Berger & Luckmann, 1967) and offer a way to study how systems of categories are formed and constitute the building blocks of sedimented social knowledge. Finally, Powell and Oberg break new ground by illustrating how interlocked, multi-level networks are able to bring together relational ties among social entities and semantic meaning structures. Apart from a novel way of studying the structuration of organizational fields or the dynamics of issue fields, a multilevel network approach has the potential to study interactions among fields.

An issue that runs through all of these process-focused accounts of institutions, although it is often well below the surface, is the role of power. The relationship between power and institutions is, as Lawrence and Buchanan (Chapter 18) claim, 'an intimate one', but it is also a complex relationship. The intimacy of power and institutions is rooted in their mutual interdependence, with institutions existentially dependent on the degree to which they exert influence over the thoughts, feelings and behaviours of people and organizations; at the same time, recent writing on institutions as inhabited and the objects of institutional work demonstrate the ways in which institutions exist (are created, maintained and transformed) by courtesy of the politics of those same people and organizations. The importance of this relationship – between power and institutions – is, unfortunately, not very well reflected in our literature and

there remains a striking ambivalence about incorporating power in institutional analyses. While studies of institutional entrepreneurship and institutional work have highlighted the politics of institutional change and stability, there has remained in our descriptions of institutions a metaphysical quality that seeks to detach them from the prosaic politics of organizations and communities. At the core of this ambivalence sits the contested ontology of institutions: whether they exist strictly as taken-for-granted cognitive structures, as eloquently argued by Phillips and Malhotra (Chapter 15) and initially laid out by Meyer and Rowan (1977), or include non-cognitive mechanisms of social control, as suggested by Berger and Luckmann (1967) and Jepperson (1991) and implicit in much of the agency-focused writing on institutions (see also, Scott, Chapter 33). Both articulations represent important possibilities and so the challenge of squaring that particular institutional circle remains.

CONVERSATIONS

Institutional Logics and Hybrid Organizations

Precipitated in part by the overview and elaboration provided by Thornton, Ocasio and Lounsbury (2012), 'institutional logic' has become one of the key terms in the institutional vocabulary. Research using the term has 'exploded' in recent years (Ocasio, Thornton, & Lounsbury, Chapter 19). It provides a vehicle by which to define and explain institutional change and stability both at the level of the field and the organization. It connects to 'categories' (Durand & Boulongne, Chapter 24), which can be conceived as the cognitive building blocks of logics, and to both geographical and relational communities (Almandoz et al., Chapter 7), and, significantly, it defines institutional 'identity', which, for many theorists, has become an essential part of the institutional story (Glynn, Chapter 9). Further, it speaks to the macro–micro interface of institutional processes (Powell & Rerup, Chapter 12) and also raises the issue of how

organizations cope when faced with 'institutional pluralism' (Kraatz & Block, Chapter 20). Today, such organizations are often referred to as 'hybrids' (Battilana et al., Chapter 5).

The idea that organizations might experience more than one set of institutional pressures is not new – D'Aunno, Sutton, & Price (1991), for example, referred to 'hybrid units' that face conflicting pressure 'from two sectors'. But interest in such arrangements languished until 'hybrids' were re-introduced by Battilana and Dorado (2010) and Pache and Santos (2010), who shared an interest in organizations that combine commercial with non-commercial goals (commonly referred to as 'social enterprises'). Today, understanding how organizations cope with multiple logics is a priority in institutional research because scholars acknowledge that such pluralism is rather the norm than the exception. Institutional theorists are not alone in recognizing that organizations are often challenged to cope with competing demands and expectations (a point emphasized by Battilana et al., Chapter 5; see also, Battilana & Lee, 2014). For us, however, studies of hybrid organizations represent a welcome return of attention within the institutional literature to the organization, thus countering the previous preoccupation with field-level processes.

According to Battilana et al. (Chapter 5) the focus of research has shifted in the last few years. One perspective (illustrated by Pache and Santos, 2013) essentially portrays individuals and groups within organizations as 'representatives' or 'carriers' of a particular logic and as committed to defending and promoting the practices associated with it. The imagery is of actors advancing 'their' logic. In this perspective, the use of discretion is relatively modest because actors find it difficult to overcome their existing preconceptions. An alternative perspective portrays actors as drawing upon different

logics according to the situation at hand. Actors 'use logics strategically' (McPherson & Sauder, 2013: 182). In this perspective, the use of discretion is higher with logics used as 'cultural tool kits' (Swidler, 1986).

The distinction between actors as either 'representatives' or 'strategic users' of logics is probably better conceptualized as a continuum of embedded discretion; moreover, the position of one actor along that continuum is likely to vary across situations and over time. Many of the difficulties faced by 'nascent hybrids' in the early years of their founding, for example, may be very different from the challenges of sustaining an established hybrid organization. Introducing a new logic into a mature hybrid, or, removing one, are also very different settings and thus different mechanisms can be anticipated. Perhaps the most important question that should receive attention is whether multi-logic organizations *do* provide more innovative solutions to big and wicked problems. As Smets, Jarzabkowski, Burke and Spee (2015: 933) remind us: 'we know surprisingly little about how such benefits are reaped'. There is much yet to uncover.

Institutional Work

Around the time of the first edition of this *Handbook* a vibrant conversation within organizational institutionalism emerged that focused on the work of actors to shape the institutions around them. The concept of institutional work, introduced by Lawrence and Suddaby (2006) as an umbrella under which stood notions of institutional entrepreneurship, deinstitutionalization and institutional maintenance, has evolved into a distinct perspective in which the relationship between agency, experience and institutions sits at its core. Since then, the institutional work perspective has generated a significant body of research that explores how, why, and when actors work to shape

sets of institutions, the factors that affect their ability to do so, and the experience of these efforts for those involved (Hampel, Lawrence, & Tracey, Chapter 21).

Along with a synthesis of research on the work done to create, transform and disrupt institutions, the institutional work perspective pointed to a lack of understanding of the role of agency in institutional persistence. Rather than assume that institutions were inherently enduring, as perhaps suggested by some definitions, Lawrence and Suddaby (2006) argued for the investigation of how actors might be working to maintain institutions. As Scott (2010: 10) observed, 'Many ideas, schema, and prescriptions are proposed, but only a relatively small subset survive […] to become institutionalized. What are the forces that provide the coherence and stability – the glue – to some practices rather than others?' In response, there has been a stirring of interest in the work done to maintain institutions, sometimes in the face of active resistance.

Dacin, Munir and Tracey (2010), for example, show how seemingly incidental and repetitive practices – in their study, high table dining practices at a University of Cambridge college – can significantly contribute to the maintenance of a complex, societal institution, such as the British class system. Lok and DeRond (2013) and Heaphy (2013) go further, distinguishing various ways by which minor breakdowns – 'breaches' – at the practice level are redressed and in doing so repair and reproduce existing arrangements. Micelotta and Washington (2013) provide a more macro lens in their account of how Italian law firms maintained their institutionalized privileges in the face of disruption from international competition. Vaccaro and Palazzo (2015), in their analysis of change in societies dominated by organized crime, remind us that not all maintenance activities are quite so low-key.

Because a central concern of all institutional research is the persistence of social beliefs and arrangements, research on institutional maintenance may be one of the most important areas for further development. Institutional maintenance also possesses the potential to shed new light on taken-for-granted understandings that defy change by their social invisibility. Many of these understandings may also have their roots in deep structures of power that preconsciously reinforce the status quo.

The institutional work perspective did not develop in isolation of other, allied sets of concerns. It represents a part of a broader wave of interest in organizational institutionalism's 'people' problem, a wave that includes writing on 'inhabited institutions' (Hallett & Ventresca, 2006), microfoundations of institutions (Powell & Rerup, Chapter 12) and Barley's (Chapter 13) notion of 'coalface' institutionalism. Hallett and Ventresca's (2006: 213) important understanding of institutions as inhabited – 'populated with people whose social interactions suffuse institutions with local force and significance' – has provided institutional scholars with a powerful image of institutional life that has animated many thoughtful empirical investigations of how people in organizations cope with and manipulate their institutional contexts. This grounding of institutions in the cognitions and behaviours of people and collective actors has gained a fuller form in writing on the microfoundations of institutions.

The institutional work perspective is also closely tied to the practice theoretic writing and research that has flourished in social and organizational research, and more recently in organizational institutionalism (as noted by Smets et al., Chapter 14). Interesting connections between institutional work and practice theory have been developed (Jarzabkowski, Matthiesen, & Van de Ven, 2009; Smets & Jarzabkowski, 2013).

Perhaps the most pointed discussion of the people problem in organizational institutionalism has been Barley's (Chapter 13) argument for integrating the Chicago School of symbolic interactionism into institutional studies. Barley argues that institutional research took a wrong turn, from which it has never recovered, in ignoring the potential contributions of the Chicago School, with its emphasis on institutions as constituted in social interaction. A great strength of Chicagoan symbolic interactionism was its attendance to and systematic theorization of the everyday goings-on of specific social worlds. And, as Barley eloquently puts it, 'everyday life is institutional theory's coalface; it is where the rubber of theory hits the road of reality' (Chapter 13: 358).

Emerging Conversations

Throughout the central themes and the subthemes within them that we have discussed, new ideas and questions continually arise and in doing so elaborate, nuance and at times stir up our understandings of institutional processes. Among these, three emerging and distinct conversations deserve particular notice: those to do with *emotions*, the *material and visual*, and *categories*.

Emotions

According to Lok et al. (Chapter 22), the cognitive emphasis within institutional theorizing 'has recently been challenged' because of the growing interest in uncovering the microfoundations of institutional processes. At one level, the possible significance of emotions is easily observable. Gabbioneta, Greenwood, Mazzola and Minoja (2013), for example, describe how analysts who raised questions about Parmalat (an Italian company that for over a decade successfully concealed its corrupted financial statements) were ridiculed into silence by other analysts and professional observers. Similarly, Senate Committees in the United States, and Parliamentary Committees of

Inquiry in the UK, often display politicians angrily humiliating senior executives of accounting firms and investment bankers because of their failure to conform to social expectations of the role that their firms are supposed to perform as 'gatekeepers' of the market system. In a very real sense, these occasions are examples of actors 'swimming in a sea of shame' (Creed, Hudson, Okhuysen, & Smith-Crowe, 2014). Moreover, it has been shown that institutional stability and disruption are processes affected by the extent to which people 'feel emotionally and ideologically committed to them' (Pache & Santos, 2013: 10).

Yet, the play of emotions is 'conspicuously absent from institutional research' (Voronov & Vince, 2012: 59). Scott (Chapter 33: 860) says: 'there is little evidence that cognitive approaches have lost their grip'. Things, however, may be changing (Lok et al., Chapter 22). Importantly, the inclusion of emotions into institutional studies is not simply about the display of emotions. On the contrary, a key insight provided by Voronov and Weber (2016), is that 'emotions are central to the very constitution of people as competent institutional actors that hold a personal stake in an institution and are enabled to interpret and perform their own role within an institutional order'. By developing the idea of 'emotional competence', these authors show how individuals learn to express institutionally prescribed roles in a competent manner – a competence that includes not simply a cognitive understanding, but also understanding how and which emotions are legitimate and expected. As they put it: emotional competence is the 'capacity to belong in and inhabit an institutional order' (2016: 457). For the most part, Voronov and Weber discuss how individuals learn their institutional roles. But the same process, we would suggest, applies also to organizations and field-level actors. Professional associations, for example, learn appropriate emotional behaviours.

The significance of including emotions into institutional thinking is that it promises to open up strikingly new ways of understanding institutional stability and disruption (the emphasis of Lok et al., Chapter 22). Having learned and become committed to patterns of formative behaviour, individuals collectively monitor and enforce institutional arrangements. Further, the degree of desire for those arrangements influences the possibility of disruption. Toubiana and Zietsma (2016; see also Toubiana, Greenwood, & Zietsma, forthcoming) illustrate how the inclusion of emotions opens new insights into the current debate over the management of 'hybrids', i.e., organizations that encompass two or more logics. These authors point out that institutional logics contain 'emotional registers' – i.e., prescriptions about appropriate 'emotional content and expression' (2016: 4). Physicians in hospitals, for example, behave according to a different register than (for example) registers that apply to sports fans, or religious leaders etc. In effect, actors embody and deploy both a cognitive framework (in effect, a system of categories and concepts) by which they make sense of their social world) *and* an emotional register by which they socially construct and respond to situations. It follows that hybrid organizations composed of logics with different cognitive frameworks *and* emotional registers are likely to experience a particularly problematical version of institutional complexity. The extent to which different logics are compatible or incompatible may be a function not simply of their relative cognitive structures (the assumption of most current work in this area) but their respective emotional registers. It is thought-provoking to wonder whether cognitive or emotional incompatibility is the more challenging occurrence. It is also thought-provoking to speculate whether emotional incompatibility is more difficult to address than cognitive incompatibility.

The incorporation of emotions into institutional analysis is intriguing. Much can be anticipated as empirical work builds upon the theoretical groundwork provided by Creed et al. (2014), Massa, Helms, Voronov and Wang (2016), Toubiana and Zietsma (2016), Voronov and Vince (2012) and Voronov and Weber (2016). Indeed, while this area remains relatively nascent it has exciting possibilities for illuminating the micro- and group-level foundations of institutional expectations and behaviour. We have much to learn but the possibilities are exciting.

Materiality and visuality

Much as the role of emotions has been neglected within institutional scholarship, so too has the role of the material and the visual. And, as with emotions, the material and the visual bases of institutions are slowly becoming acknowledged. Jones et al. (Chapter 23) stress the significant role and influence of visual images and material artifacts for institutions and institutional processes and mechanisms. They argue that institutions are multimodal, i.e., sedimented in, and represented by, a variety of sign systems. However, currently too much of our existing knowledge on the workings of institutions relies on the study of verbal language. Material artifacts are durable and transferable (Jones, Boxenbaum, & Anthony, 2013); their characteristics and features contribute to 'relative permanence' and therefore influence what endures or decays. The visual has its own specific ways of organizing, transmitting, and storing meaning that distinguish it from verbal language. These characteristics include, for example, spatiality, immediacy of perception, the ability to evoke emotional responses, or (in contrast) the signaling of scientific detachment (as in the use of charts and graphs in presentations). The visual may become of even greater significance in the future because of the growth and increasing sophistication of communication technologies.

Jones et al. (Chapter 23) use core concepts such as legitimacy, institutional logics, or identity to outline the potential that embracing materiality and visuality has for institutional research. They discuss, for instance, how material and visual camouflage help legitimize innovations (e.g., electricity in the study by Hargadon & Douglas, 2001), or facilitate 'legitimacy spillovers' (e.g., Haack, Pfarrer, & Scherer, 2014) by connecting divergent elements in spatial arrangements. Indeed, they suggest that in addition to the various forms of legitimacy more usually captured (see Deephouse et al., Chapter 1), 'aesthetic legitimacy' also exists and needs to be studied. In addition, they encourage us to think of visual and/or material 'repertoires' that, similar to 'vocabularies' (e.g., Jones & Massa, 2013; Höllerer, Janscary, Meyer, & Vettori, 2013), are characteristic for specific institutional logics, distinct communities, or are part of institutional infrastructures of particular fields. The ability to bridge between institutional domains (Höllerer et al., 2013) and to create boundary objects (e.g., Jones & Massa, 2013) increases the opportunities for organizations to comply with institutional pluralism or deal with complexity and may be an important resource for hybrid organizations or globally oriented organizations. Material artifacts and visual images are important 'tools' for the institutional work of actors. Translation, identity, categorization, and emotionality are further examples of core institutional concepts where materiality and visuality have a substantial impact and where further research into their workings may elicit new mechanisms or change our understandings of existing mechanisms and processes.

Categories

Initially, the study of categories emerged primarily in relation to ecological approaches and in particular the idea of a 'categorical imperative' (Zuckerman, 1999), which is tied tightly to notions of legitimacy. In general terms, categories represent socially

constructed labels that differentiate 'objects, people, practices, and even time and space' (Lamont & Molnár, 2002: 168). Categories, from an ecological perspective, are constructed in terms of prototypes comprised of elements, such that possessing 'more (or fewer) of these features or elements […] makes it possible to categorize an entity more (or less) securely in that category' (Durand & Paolella, 2013: 1101). Categories from this perspective are closely linked to cognitive institutions (see Phillips & Malhotra, Chapter 15), providing taken-for-granted boundaries within which actors, action and objects need to fit in order to gain legitimacy.

As Durand and Boulongne (Chapter 24) point out, a broader, more institutional understanding of categories would emphasize their embeddedness in and connections to social practice. From this perspective, a category's meaning is a function not only of cognitive constructions, but also of the social practices in which a category is embedded (Glynn & Navis, 2013), practices that 'express and contribute to the social valuation of a category' (Delmestri & Greenwood, 2016; see also Glynn & Navis, 2013; Khaire & Wadhwani, 2010). As Glynn and Navis (2013: 1127) put it: 'categorizing is not purely cognitive, but socio-cultural as well because it is anchored in the context in which categorization occurs'. The social and evaluative nature of categories exposes them as potential objects of institutional work: one of the most famous examples of such work is 'the diamond invention', led by De Beers, which 'convert[ed] tiny crystals of carbon into universally recognized tokens of wealth, power, and romance', created an understanding of diamonds 'not as marketable precious stones but as an inseparable part of courtship and married life', and 'endow[ed] these stones with a sentiment that would inhibit the public from ever reselling them' (Epstein, 1982).

The theorization of categories within the institutional perspective is still unfolding, but recent studies indicate the rich insights that can be generated by doing so (see, for example, Cornelissen, Durand, Fiss, Lammers, & Vaara, 2015; Glynn & Navis, 2013; Kennedy & Fiss, 2013; Ocasio, Loewenstein, & Nigam, 2015; Wry, Lounsbury, & Glynn, 2011).

SOCIETAL CONSEQUENCES

Scott (Chapter 33, p. 853) compliments institutional theorists for a long-standing willingness 'to take on the tough fundamental questions'. Early studies in particular sought to understand important societal issues and the place of organizations within them. More recently, however, there has been disquiet regarding our distraction from broader issues of the societal consequences. Hardy and Maguire (Chapter 10), for example, conclude that most studies of institutional entrepreneurship ignore 'the power relations that pervade institutional fields', which means that we do not ask the fundamental question of 'Who benefits?'. Munir (2011: 114) rebukes the 'silence of institutional theorists' over the 2008 financial crisis. That silence, he says, implies that 'we have little or nothing to contribute'. Cooper, Ezzamel and Willmott (2008) even argue that institutional theory is unable to rigorously address issues of power, and by implication that it is an inappropriate lens for studying societal issues of this kind. For a response to this polemical assertion, see Lawrence and Buchanan (Chapter 18) and Hudson, Okhuysen and Creed (2015). Others have raised the need to focus upon problems such as climate change, corruption, exploitation, etc. (see Ferraro, Etzion, & Gehman, 2015 for a typical statement of this kind).

This unease within the institutional community is warranted and not restricted to institutional studies (see, for example, Pfeffer, 2016; Guthrie & Durand, 2008). It could

be argued, moreover, that attention *has* been given to larger societal issues (see, for example, Schneiberg and Lounsbury's account of social movements, Chapter 11). Nevertheless, by and large, we are guilty as charged – or at least partly so. We have given insufficient attention to understanding some of the major societal consequences of institutional processes. But things are changing. Attention is turning from understanding institutional processes *per se*, to understanding their implications for major societal issues. The dependent variable has shifted from institutional processes towards institutional outcomes.

The rising conversation over the societal consequences of institutional processes is reflected in several new chapters in this volume. David, Sine and Serra (Chapter 25) connect those arrangements to economic development via entrepreneurial initiatives; two chapters (Davis, Chapter 26; and Amis et al., Chapter 27) look in very different ways at the institutional underpinnings of economic inequality; Palmer (Chapter 28) reviews the relationship between organizational wrongdoing (including corruption) and institutional arrangements; Jennings and Hoffman (Chapter 29) review the application of institutional theorizing to the natural environment; Rojas (Chapter 30) and Dobbin and Kalev (Chapter 31) analyse how institutional arrangements construct and differentially affect socio-demographic communities. Moreover, it would be inappropriate to conclude that these chapters are the only ones that speak to institutional consequences. The discussions contained in both in the 'new' and revised chapters reflect this shift in conversation towards societal consequences.

CONCLUSIONS

It is perhaps fitting that the concluding chapters of this edition are reflections by two of the most influential contributors to the institutional approach: John Meyer (Chapter 32)

and Dick Scott (Chapter 33). John Meyer stresses the increasing rationalization in the modern stateless but globalized world and urges us not to forget that interested actors are institutionally constituted and not to overlook how 'models of organized actorhood expand, penetrate every social sector and country' (p. 848) – swallowing all other forms of coordinating activities and transforming them into formal organizations. Dick Scott, reviewing the development of the institutional approach to organizations, concludes that the theory is 'flourishing'. But, echoing our point above concerning consequences, he concludes by saying that: 'In a time when some of our most central institutional structures – political bodies, public agencies, financial institutions, corporations – are viewed by growing numbers as either corrupt, ineffective, or both, institutional theorists should be devoting more attention to examining what kinds of actions make them function better and what kinds undermine them (p. 866-867).'

And Where to Now?

Our first suggestion builds upon the above discussion of the need to better understand the consequences of institutions. Future scholars need to ask not about the degree of discretion institutional actors exhibit but how and when discretion is most formidable as a response to institutional constraints and how these variations in discretion wreak havoc or benevolence upon the organizations and societies that have previously taken these volitionally broken shared understandings as historical givens. We have established that institutionalized behaviours allow for discretion (the paradox of embedded agency, the witnessing of institutional work and entrepreneurship). The consequences of this discretion are especially crucial to future research. Such discretion is particularly profound for those on whom it is enacted because it represents the tearing down of practices, behaviours and structures that many may have felt were sacred,

unshakeable or unworthy of abandonment. The fallout after discretion that has been successfully exercised is an important source of further study.

One might also go so far as to say that highly institutionalized organizations and contexts should only be interesting to organizational scholars to the extent that their maintenance or violation bring benefit or harm to organizations and societies. Whether highly institutionalized practices are relatively trivial versus consequential (e.g., the custom of a handshake versus the custom of racial segregation) should serve as one apt guidepost for future research in institutional theory. For future institutional analysis to be viewed as relevant, the responsibility will increasingly fall to the institutional scholar to convince us whether a handshake, for example, may carry deeper implications for organizations and the actors that reside within them and whether its discontinuity or withdrawal as an institutional practice should matter to organizational researchers. Institutions *per se* do not matter. It is the depth and profundity of their consequences, coupled with their ubiquity, that make them so indispensable to understanding organizations and organizational behaviour.

This suggested direction of future research is fortified by recent calls to place organizations squarely in the empirical investigation as the dependent variable of institutional studies. As Greenwood, Hinings and Whetten (2014: 1206) argue, 'institutional scholarship has become overly concerned with explaining institutions and institutional processes, notably at the level of the organization field, rather than with using them to explain and understand organizations'. We adhere strongly to this view, believing, as we noted at the outset, that our fundamental focus as organizational researchers surrounds organizing and organizations, their inhabitants and the surrounding communities affected by them. Scholars of institutional theory should,

indeed, be more than proud of the strides that they have achieved in understanding the realms of what institutional pressures look like, what forms or categories they take (e.g., logics), how they exhibit predictable processes (e.g., institutional work), how the pillars of institutionalism (Scott, 2004) can be interpreted as a set of institutional typologies, and how institutional phenomena emerge and change over time. We see the need, however, for more studies in which institutional phenomena serve as the independent variable given that a review of the institutional literature indicates that the obverse has tended to characterize institutional theory's direction.

Equally important to the success of future institutional investigation is a scholarly loyalty among institutional theorists to the very roots of institutionalism – stasis and continuity – as influences upon organizations. Framed as a more generalized future recommendation, some scholars have simply asked us not to place an overemphasis on heterogeneity in studying institutionalization.

> Although, admittedly, differences, change, or heterogeneity may seem more exciting compared to similarity, stability, resilience, or homogeneity, we want equally to emphasize that *institutional* organization theory ought to make sure not to lose sight of its central claim to study *institutions.* (Meyer & Höllerer, 2014: 1222; emphasis in original)

We believe that the study of stasis as a core characteristic of institutionalism raises the important dark side of institutional influence when it is manifested as latent compliance with harmful norms, unintended failures to recognize the potential evils of taken-for-granted beliefs that defy questioning or resistance, the looming danger of 'nonchoice behaviour' in which, for example, the inferiority of a race or gender is so taken-for-granted that granting votes or other citizen rights do not even occur to the members of the field. The stasis that characterizes some institutionalized behaviours begets

cognitive lock-in that is disturbingly deterministic. As institutional theorists, we are only beginning to understand the deep structures of power that often attend stasis and continuity, but far more remains to be investigated. Responding to valid observations that institutional theory does not always rigorously encompass power in their explanations (Clegg, 2010; Meyer & Höllerer, 2014; Munir, 2011, 2015), we see fruitful lines of future inquiry into the deep structures of power (and often elitism) that perpetuate the status quo and its accompanying institutionalized behaviours to the disadvantage of organizations and marginalized participants due to taken-for-granted understandings that have their roots in long-standing historical inequalities that render the assumptions underlying them virtually invisible to those who are oppressed.

The failure to critique or in some cases even recognize unequal power is one of the most fascinating and haunting outcomes of the dark side of institutional theory because it excuses oppression or inequality as simply 'the way we have always done things around here' and is among the most highly validated evidence that something is institutionalized because it is no longer even questioned by even the most well-meaning (if ignorant) participant in the institutionalized process. This phenomenon is among the main reasons why we need to focus more on the 'ideational aspects' of institutionalism, as we note below.

Interestingly, the reverse possibility, that stasis and continuity may supply organizations with particular benefits has received almost no scholarly attention, even though these are the very characteristics that define institutionalization. This may be the point where we need to connect more deeply with the microfoundations of institutions and link stasis to those conditions under which the desires, interests, cognitions and motivations of individuals support either a well-reasoned or,

alternatively, oppressive preference for continuity. One avenue is those scholars that advocate linking the literature on learning to the microfoundation of institutional theory to fully understand how and why organizations make the decisions they do to support or reject change (Chandler & Hwang, 2015). To date this area has received scant attention.

Our optimism for the significance of future institutional research rests partly on its catchment area as a topic that has preserved what can only be viewed as a preciously wide array of voices, methodologies, foci and underlying ontologies that a range of scholars continue to bring to the topic of institutionalism. Institutional conferences, colloquia, conversations and publications; cheek-by-jowl, sociologists, ecologists, critical theorists, strategy advocates, sociologists, international business scholars and die-hard positivists, all continue to spawn rich contributions and indictments of the theory. This form of inclusiveness, which is scintillating in its discourse and unsilencing in its depth of analysis, has given us the treasure of both intriguing theory extension and critical indignation at the types of agency, constraints and consequences that institutionalized behaviours create. Why the management field has been so fortunate as to attract such a hugely rich and potentially combative range of arguments and epistemologies in institutional theory is puzzling. We simply hope this rich form of inclusiveness will continue and we like to think it will because the theory is so relevant to so many aspects of organizations, including the important emerging conversations on topics like emotions, materiality and visuality, as well as societal consequences. To this end, we also share Suddaby's (2010: 15) request for more attention to 'the notion of meaning or what Scott (1994) terms the *ideational* aspects of organizations' [emphasis in original]. More emphasis on the subjective ways by which actors

experience institutions is needed in order to redress the imbalance (pointed out quite correctly by Suddaby) that there is too often a preponderance of proxies for meaning.

Given our earlier premise in considering the dark side of institutionalism that 'actors themselves often do not understand their own motives for subordinating themselves to social pressure' (Suddaby, 2010: 16), there can be little doubt that institutional theory, in particular, should be taking its part in opening the black box of meanings, identifying those meanings (and their implications for power) rather than depending on proxies or researcher-attributed logics to teach us how meaning systems shape organizations so profoundly.

The elegance of institutional theory is that it holds to account both those agents who perpetuate the status quo (forces for coercive, isomorphic and normative isomorphism, for example) and those who assault the status quo to achieve significant change (institutional workers, institutional entrepreneurs). It is precisely at this nexus of stasis and change that we believe we may be able to learn the most about both institutional stability and change as fundamental source for good, for achieving effectiveness, and for combating harm to individuals and organizations. We feel that institutional theory's inclusiveness of such a wide range of perspectives and methodologies is a celebratory testament to the flexibility and intellectual vigor of those many scholars who investigate this theory's domain. We also hope that this scholarly range is indicative of the theory's true explanatory capacity and applicability to an unusually broad range of organizational phenomena.

NOTE

1. The first edition is available online.

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