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Exploring the Institutional Agency of Organisational Hybridisation

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*A thesis submitted in partial fulfilment of the requirements for the degree of Doctor of
Philosophy, The University of Auckland, 2018.*

Abstract

Institutional theory has been interested in the transformation of taken-for-granted practices, values and norms since the early 1990s. Initial studies located the sources for institutional change in unexpected and disruptive events. More recent contributions explore conditions that enable and motivate individuals and organisations to promote alternative institutional arrangements. Others attend on the social actions—the institutional agency—of actors that create, reproduce, and change institutions. Contributions often disregard the embeddedness of agency that is central to an institutional perspective. This refers to the assumption that highly embedded actors are neither motivated to desire nor able to envision alternative ways of doing things because institutions shape and define their cognitions, interests and identities. To explain change that originates from the efforts of embedded actors, scholars increasingly draw on Friedland and Alford's (1991) conceptualisation of contradictory institutional logics. Institutional logics are the core organising principles associated with a specific societal domain and its related beliefs, practices, and arrangements (Maguire, 2008). Scholars have shown that institutional change emerges from hybrid actors; organisations and individuals that engage with contradictory logics and integrate them into their structures, processes and behaviours. Intra-organisational insights into the social actions involved are, however, missing. Scholars therefore call to study the process of organisational hybridisation when a dominant logic is challenged and an alternative is integrated and promoted within an organisation (Schildt & Perkmann, 2016).

Building on an embedded, ethnographic case study of an engineering consulting firm, this research explores how individuals create a social position that enables them to challenge a firm's dominant logic and to promote an alternative; the practical activities involved in these efforts; and the consequences that materialise. Data collection consisted of six-month participant observation, supplemented with interviews and archival data. The principal findings show that actors selectively draw upon multiple logics to position themselves better in the organisation, expose others to contradictions between and within logics, and mobilise them to embrace an alternative logic. Emerging from these efforts, a set of actors within the firm drew increasingly upon the alternative logic in their daily work. Others integrated elements in their rhetorics only whereas practices and identities remained steeped in the firm's dominant logic. This evoked a sense of distinctiveness between actors, and undermined collaboration.

Acknowledgements

While undertaking PhD research is often a solitary journey, the loneliness is lightened by all the people whom one encounters along the way. Through the course of the last four years, I was fortunate that so many offered their guidance, inspiration and motivation. Foremost, I would like to express my special appreciation to my co-supervisor Peter Smith, without whose support, guidance, and sense of (English) humour this study would have forever remained the daunting task it seemed in the beginning. Thank you, Peter, for inviting me on this journey, for sparking my interest in Professional Service Firms, for your invaluable advice on my research and my career and for opening many doors which would otherwise have remained closed. I am also grateful to my supervisor Chris Woods for her encouragement and feedback throughout this long journey.

Special thanks go to the professionals at 'Corgan' who allowed me to study the daily struggles engineering consultants face and who shared their time and experience to help me making sense of what I saw. In particular, I would like to thank Thomas Yorke for all the stories, insights, information and materials he shared with me. My fellow doctoral researchers and colleagues are owed a special vote of thanks for their emotional and intellectual support. In particular, I would like to thank Ziad for discussing emerging thoughts with me and Fasiha for all the time we spent on the social bridge. My sincere thanks also go to Frank and Lisa and all the others who joined for our regular drinks at the Old Government House. More than one idea that I present in my thesis was born when having a jug of beer with you.

I also need to thank all my favourite bands and musicians. When feeling lost in thesis writing, listening to Frank Turner's "The Ballad of Me and My Friends" or to Nick Cave's "The Ship Song" always lifted my spirits. Finally, I want to thank my friends and my family for their help, encouragement, and belief in me. To Sebi, Leni, Pauli, Martin, Paula, and all the others, thank you for taking care of Ella and Birgit while I was busy writing my PhD. To Mama and Papa, thank you for fostering my curiosity, for showing me what hard work means and for not expecting me to take over our farm in the near future. To my beloved daughters Ella and Mira, thank you for putting a smile onto my face every time I see you. And most importantly, thank you my darling Birgit for all your emotional and financial support, your patience and your understanding. I love you and I hope you will marry me one day.

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CHAPTER 1: Introduction

1.1. Aim of the chapter

The purpose of this chapter is to introduce this research and to justify its theoretical and practical importance. The first section frames the aim of the research and the gaps in the literature it addresses. The research methods and the empirical setting of this study are then introduced. Following this, I justify why the identified research problem is worth exploring and to what extent the chosen context promises interesting insights for academics and practitioners alike. This chapter ends with setting out the structure for the rest of this thesis.

1.2. Research aim

An institutional perspective on social phenomena fundamentally postulates that actors—individuals and organisations—are “embedded in an ‘institutional’ context of socio-cultural ideas and beliefs that prescribe appropriate and socially legitimate ways of doing things” (Greenwood, Hinings, & Whetten, 2014, p. 1208). Organisational and individual choices are constrained not only by technological, informational or resource limits (Donaldson, 2011; Oliver, 1997), but also regulative frameworks, normative expectations and cultural-cognitive taken-for-granted assumptions might induce social action that defy economic rationality (DiMaggio & Powell, 1983; J. W. Meyer & Rowan, 1977; Scott, 2008b; Suddaby, 2015). Earlier institutionalists sought to identify causal sources and mechanisms in the “institutional environment” (Zucker, 1987, p. 443) that impose homogenous requirements on passive actors (DiMaggio & Powell, 1991; Scott, 1995, 2008a). Researchers in turn showed that actors who are subjected to the same institutional pressures adopt similar structures, processes and practices in response to monolithic “institutional prescriptions and proscriptions” (Greenwood & Hinings, 1993, p. 1058). The traditional portrayal of “organizations as captives of the institutional environment” (Tolbert & Zucker, 1983, p. 22) and individuals as “over-socialized and slavishly devoted to the reproduction of habits” (Battilana, Leca, & Boxenbaum, 2009, p. 67) was critiqued for failing to explain institutional transformation. Researchers have shown, in response, that taken-for-granted assumptions, collectively held norms or established organisational practices can change over time. Those instances were assumed to be an exceptional phenomena, triggered by unexpected and dramatic events that are “smacking into stable institutional arrangements” (Clemens & Cook, 1999, p. 447; Oliver, 1992). More recent

literature has reintroduced agency, intentionality and power into institutional analysis (Garud, Hardy, & Maguire, 2007). Contributions locate the origins of institutional change in the efforts of embedded actors, and explore the conditions and skills that enable so-called 'institutional entrepreneurs' to promote their "preferred institutional arrangement" (Spicer & Sewell, 2010, p. 921; DiMaggio, 1988; Battilana et al., 2009). Other scholars shifted their attention to the practical efforts of actors when they create, maintain or transform institutions (Lawrence & Suddaby, 2006). Referring to those activities, Zilber (2002, p. 236) speaks of "institutional agency" that she defines as "the social actions that create, reproduce, and change institutions".

Most of the literature outlined so far is underpinned by an implicit assumption of uniformity in the institutional environment faced by actors (Scott, 2008a). That in turn raises the question how and why some actors are able to envision and promote alternative institutional arrangements while others, firmly embedded in the same context, are not (Battilana & D'Aunno, 2009). In recent years, Friedland and Alford's (1991) meta-theoretical conceptualisation of contradictory 'institutional logics' has gained much attention in this context. Instead of portraying institutional demands as homogenous, they conceptualise actors as being entangled in a web of institutional logics that providing "a continuous source of tensions and conflicts within and across institutions" (Seo & Creed, 2002, p. 225). For instance, the institutions of profession, family and religion are typically associated with collaboration, ethics and public benefit. In turn, those conflict with the logics of markets and corporations that reflect ideals around profit orientation, competition and self-interest (Blomgren & Waks, 2015; Thornton, Ocasio, & Lounsbury, 2012). One logic is typically assumed to dominate a social situation and to provide actors with a template for social action. The constant experience of contradictory institutional logics is also presumed to lower the embeddedness of actors, to trigger reflexivity and in turn to facilitate institutional change (Benson, 1977; Seo & Creed, 2002). The conceptualisation of multiple institutional logics that impose incompatible demands suggests that actors need to respond to the tensions that inevitably arise (Greenwood, Raynard, Kodeih, Micelotta, & Lounsbury, 2011; Pache & Santos, 2010, 2013b). Scholars speak of 'hybrid organisations' that are able to cope, or actively manage and exploit, "different organizing principles and conflicting goals and priorities" (Schildt & Perkmann, 2016, p. 3).

The emergence of such hybrid organisations has been observed in the increased commercial orientation of hospitals and universities (D'Este & Perkmann, 2011; Reay & Hinings, 2005); microfinance organisations that integrate a social mission and commercial goals (Battilana & Dorado, 2010); or firms where individuals with diverse professional backgrounds deliver multi-disciplinary services offerings (Greenwood & Suddaby, 2006). Most scholarship emphasises the conflict between institutional logics and strategies that organisations and individuals draw upon to avoid such tensions (Greenwood et al., 2011; J. W. Meyer & Rowan, 1977; Oliver, 1991). Others acknowledge that the artful integration of multiple logics can lead to competitive advantage and superior solutions for increasingly complex and interrelated problems (Mair, Mayer, & Lutz, 2015; Noordegraaf, 2015; Schildt & Perkmann, 2016). Existing scholarship has also shown that broader institutional change originates in hybrid organisations when actors cope with conflicting institutional demands on a daily basis (Smets, Morris, & Greenwood, 2012). Most attention so far has been put on hybrid organisations as such; in this literature, scholars explore the structures, processes and practices that actors deploy to reconcile multiple institutional logics (Pache & Santos, 2010, 2013b). Much less is known about the intra-organisational dynamics involved when a previously “dominant organizational logic” (Spicer & Sewell, 2010, p. 913) is challenged, an unfamiliar rival logic is integrated, and a hybrid organisation emerges. In this context, Schildt and Perkmann (2016) recently called to study “organizational hybridization as a dynamic change process” (p. 2) rather than the “resulting hybrid settlements” (p. 4). They argue that this necessitates studying an “organizations’ transitory phase” (p. 5); when it breaks with a previously dominant logic, intra-organisational coalitions form around a new logic and organisational activities are adjusted and aligned. The theorised process of organisational hybridisation intuitively involves some form of institutional agency when a firm’s dominant logic is challenged and rival logic is integrated and promoted (Maguire, 2008). However, empirical insights into the individual, intra-organisational dynamics involved are largely missing in the literature.

1.3. How does this research address the issue?

The notion of institutional agency as the purposeful efforts of individuals to challenge dominant institutional logics, and to promote alternatives, suggests that the everyday, mundane efforts of individuals within organisations might constitute the earliest moments of

institutional change (Seo & Creed, 2002; Smets, Morris, & Greenwood, 2012). The theorised 'process of organisational hybridisation' (Schildt & Perkmann, 2016) also points to the importance of micro level social action when organisations and their members adopt hybrid practices and structures. Institutional theorists, however, have largely treated the organisation as a "black box" (Cloutier & Langley, 2013, p. 362), ignoring the very micro level unit of analysis in studies of institutional transformation (W. W. Powell & Colyvas, 2008a). Most studies that focus on the micro level of analysis draw on retrospective accounts obtained from interviews and archival data, yet they fail to capture social action as it occurs in everyday situations (Cardinale, 2018; Lawrence, Leca, & Zilber, 2013). This research draws on an ethnographic case study that allowed me to explore the everyday efforts of individuals, and the consequences of those actions. The case that underpins this research is an engineering consulting firm's attempt to establish and grow a business unit delivering non-traditional services such as management consulting. The firm seeks, at the same time, to implement what participants called a "new business model" emphasising a multi-disciplinary service offering, cross-selling and in general a more commercial take on engineering consulting work. Both of those efforts require the organisation and its members to partially abandon the expectations prescribed by the firm's dominant professional logic and to integrate a commercial-market one.

1.4. Why and for whom is that interesting?

Exploring the micro level activities involved in the process of organisational hybridisation promises valuable insights for three audiences: (1) institutionalists who are interested in endogenous institutional change, (2) scholars of hybrid organisations who call to research hybridisation as a dynamic change process, and (3) practitioners and academics who are interested in innovation in Professional Service Firms (PSFs).

First, institutionalists have long been interested in the erosion and transformation of values, norms and taken-for-granted assumptions. For scholars in this domain, the "paradox of embedded agency" (Seo & Creed, 2002, p. 223) has been the central puzzle for decades. Similar to the broader structure-agency debate in social science, this refers to the central challenge to reconcile a deterministic institutional environment and the projective agency of embedded actors who envision and promote alternative institutional arrangements (see, for

instance, Friedland & Alford, 1991; Sewell, 1992). Greenwood and Suddaby (2006, p. 27, emphasis added) summarise this fundamental issue when they ask: “if, as institutional theory asserts, behaviour is substantially shaped by taken-for-granted institutional prescriptions, how can actors envision and enact changes to the contexts in which they are embedded?” Existing scholarship under the label ‘institutional work’ has already provided valuable insights into the practical activities involved when actors enact changes as the promote alternative institutional arrangements (Lawrence & Suddaby, 2006). Others who study institutional entrepreneurs have focused on the condition that enable and motivate actors, usually organisations, to promote institutions that align with their interest. However, both literatures often fail to explain how actors can envision alternative institutional arrangement in the first place. Taking the embeddedness of actors seriously, institutional theory postulates that norms, beliefs and behaviours are “institutionally determined” (Greenwood & Suddaby, 2006, p. 42) and alternatives are rendered “unthinkable, irrational or inefficient” (Schneiberg & Lounsbury, 2008, p. 649). To tackle the paradox of embedded agency, institutionalists call for attention to the individual level of analysis and the reflective capacity of actors (Battilana, 2006). In recent years, Seo and Creed’s (2002) contradiction framework has attracted much attention by scholars who are interested in change in highly institutionalised settings . Seo and Creed (2002) build on Friedland and Alford’s (1991) meta-theoretical conceptualisation of competing institutional logics and the notion of projective human agency, proposing a dialectic model of institutional change. They argue that actors can envision alternative institutional arrangements because of the contradictory values, assumptions, beliefs and expectations inherent in diverse institutional logics. In turn, the experience of contradictory logics triggers institutional agency where actors enact change and mobilise others. However, empirical micro level insights that draw on this framework to explain institutional dynamics within organisations are, however, largely missing (see Smets, Morris, & Greenwood, 2012 for an exception).

Second, institutionalists are acknowledging the importance of hybrid organisations who can integrate competing institutional logics into their structures, processes and practices (Greenwood et al., 2011; Pache & Santos, 2010, 2013b). Most of the literature has focused on the strategies those organisations adopt to cope with conflicting institutional demands. Much less is known about the process when organisations develop hybrid arrangements in the first

place (Schildt & Perkmann, 2016). This holds especially true for mature organisations in highly institutionalised settings. Those are assumed to be guided by a dominant organisational logic that is reflected in its organisational arrangements and in the values, norms and behaviours of “organizational members who have been socialized or trained into a specific institutional logic” (Pache & Santos, 2010, p. 460). Some micro level research suggests, however, that institutional change emerges from within such organisations when they partially abandon an previously dominant logic and an alternative logic is integrated in structures and practices (Smets, Morris, & Greenwood, 2012). Studying the process of hybridisation in mature organisations promises valuable insights into the context of broader institutional change (Suddaby & Greenwood, 2009).

Third, Professional Service Firms (PSFs), such as accounting, law and engineering firms, have gained significant importance in today’s business environment and are seen as prime examples of a more knowledge-based economy (Brock, Powell, & Hinings, 2007; Greenwood, Suddaby, & McDougald, 2006; Løwendahl, 2005). Some authors even argue that PSFs are the “most important firm type, as they represent one of the fastest growing industries” (Jensen, Poulsen, & Kraus, 2010, p. 2045) and that without them “business as we know it, would come to a grinding halt” (Sharma, 1997, p. 758). PSFs are said to have “an inherent imperative for both organic growth and diversification” (Anand, Gardner, & Morris, 2007, p. 407). Innovation is thus believed to be an important value drivers for such firms (Løwendahl, 2005; Morris, 2008). Mature professional sectors, such as accounting, law and engineering, are, however, typically described as “highly institutionalized” settings (Greenwood, Suddaby, & Hinings, 2002, p. 58) where organisational and individual behaviour is shaped by shared taken-for-granted assumptions, values and beliefs (Greenwood, Díaz, Li, & Lorente, 2010; Lawrence, Malhotra, & Morris, 2012). Consequently, innovation within PFSs is typically assumed to be incremental and “caged within professional boundaries” (Reihlen & Werr, 2012, p. 6). In the same tenor, Sundbo (1997, p. 447) argues that “professions set up a framework—some trajectories for the thoughts, which limited the fantasy and the wildness” of professionals.

A series of publications has also shed light on radical innovation when PSFs adopt hybrid forms of organising, diversifying into non-traditional areas of expertise. These contributions show that some large PSFs incorporated a commercial-market logic into their

structures, processes, and practices and developed non-traditional services that challenged a dominant professional logic (Greenwood & Suddaby, 2006; Greenwood et al., 2002; Suddaby, Gendron, & Lam, 2009; Suddaby & Greenwood, 2005). For instance, Greenwood and Suddaby (2006, p. 43) claim to study the “toughest example of embedded action” in their study of large accounting firms that adopted multi-disciplinary (hybrid) organisational forms. In those organisations, members with diverse professional backgrounds, including lawyers, accountants, auditors and management consultants, provide one-stop-shop services to a global client base. The new organisational form also emphasised the importance of cross-selling, profit orientation and in general the commercial acumen of professionals. Greenwood and Suddaby (2006) draw on Seo and Creed’s (2002) notion of institutional contradictions and show experienced contradictions enabled such PSFs to envision alternative institutional arrangements and motivated them to adopt hybrid forms of organising. Intentionally excluded was the the institutional agency, what Seo and Creed (2002) label praxis, of how those firms achieved change; the process of hybridisation and the micro level efforts involved remain therefore underexplored in the context of professional service innovation. Given that hybrid organisations are associated typically with competitive advantage and superior service quality (Kirkpatrick & Noordegraaf, 2015), fine-grained insights into the intra-organisational dynamics might also be valuable for practitioners.

1.5. Structure of the thesis

This thesis consists of nine chapters. This chapter (chapter 1) introduces the aim of the thesis, and its context, and justifies its importance from an academic and practical perspective. This chapter also outlines the structure adopted for the thesis.

Chapter 2 reviews institutional literature in organisational studies to elaborate existing gaps and potential contributions. The chapter describes how earlier contributions show that actors who are embedded in the same institutional environment, that of an organisation field, gradually adopt similar structures and processes. Scholarly attention then shifted to exogenous forces for institutional change. Subsequent contributions located the source of institutional change in the purposeful efforts of embedded actors, exploring enabling conditions and practical activities involved when individuals and organisations promote alternative institutional arrangements. Most of this literature depicts the institutional

environment as uniform in terms of ‘a dominant institutional logic’ or ‘institutional pressures’ that impose homogenous requirements on embedded actors. In contrast, the notion of contradictory institutional logics has gained scholarly attention in recent years. The conceptualisation of multiple institutional logics is relevant for this thesis in two ways. First, so called hybrid actors who can manage and integrate competing institutional expectations are assumed to be better positioned in an increasingly complex environment. Scholars recently called to study how organisations transition from being guided by one dominant organisation logic towards the integration of multiple logics. Second, contradictory logics are also believed to increase an actor’s reflective awareness and in turn trigger the projective human agency necessary for institutional change (Emirbayer & Mische, 1998; Seo & Creed, 2002). Chapter 2 will argue, both of those perspective suffer from a dearth of empirical micro level insights.

Chapter 3 outlines how institutional theory has been evoked by scholars to explain stability and change in professional settings. Drawing on the four themes of institutional scholarship outlined in chapter 2, this chapter shows that earlier literature explained stability in professional settings by evoking the notion of a dominant professional logic. Chapter 3 also discusses innovation in professional settings relating this phenomenon to the broader dynamics of institutional change. The chapter shows that contemporary PSFs are frequently depicted as hybrid organisation’s which are able to integrate assumptions and ideals from allegedly incompatible logics. The chapter also argues that the literature has not systematically explored the process of hybridisation within those firms as they transitioned from being guided by a dominant professional logic to a hybrid logic.

Chapter 4 synthesises the identified gaps into a conceptual framework and shows not only how this framework informed the research process but also how it emerged from the empirical data. Based on these insights, three research questions in the broader context of organisational hybridisation and the involved micro level efforts are articulated. Chapter 5 discusses the research design adopted for this study. It justifies the underlying philosophical paradigm, the adopted research strategy, that of ethnographic, embedded case study, and the choices made regarding units and levels of analysis, study design and case selection. It also outlines methods of data collection, how analysis was conducted, and how the transferability and trustworthiness of the research was ensured.

Chapter 6 accounts for the importance of context in institutional research. It sketches the historic development of the engineering (consulting) profession, and the contemporary challenges faced by engineering consulting firms. It also discusses the historic overlap of engineering with the management consulting profession. Chapter 6 introduces the New Zealand-based engineering consulting firm Corgan that is at the centre of this research. It discusses the firm's historic development, governance structure, and organisation culture that both reflect the fundamental elements of the engineering consulting professions and also the firm's history. Chapter 6 outlines Corgan's recent attempts to diversify into non-traditional areas of work while simultaneously adopting a more commercially-focused conceptualisation of doing engineering consulting work.

Chapter 7 reports the findings of the thematic analysis on micro level activities involved in organisational hybridisation. It first introduces the key actors and their purposeful efforts to construct a position within the firm that enabled them to challenge a deeply entrenched way of doing things. It attends to the mundane, every-day activities of those professionals and others when they undermined the firm's dominant professional-engineering logic and promoted the integration of an alternative one. Chapter 7 also shows that the consequences of those efforts were somewhat different from the ones intended at the outset.

Chapter 8 discusses these findings in the light of existing theory and synthesises the observed micro level efforts and outcomes into theoretical meaningful concepts. Finally, Chapter 9 concludes this study and identifies three main contributions made by this research. It shows how the insights gained increase the current understanding of micro level activities involved in organisational hybridisation, but also in the context of unintended outcomes that those efforts might evoke. Chapter 9 ends with a discussion of the limitations of this study, suggestions for future research, and some concluding remarks.

CHAPTER 2: An institutional lens

2.1. Aim of the chapter

This chapter reviews pivotal research that contributed to the current understanding of institutions, their stability, and their transformation, in organisational studies. It thus positions this thesis in a research domain within the wide tent of institutional scholarship. First, this chapter introduces the history of institutional theory and fundamental concepts. Based on this, the next sections discuss four main themes of institutional scholarship as attention gradually shifted from institutional persistence to transformation and agency. The first of these sections focuses on institutional stability that emerges from socio-political pressures or dominant institutional logics. The next section discusses exogenous sources for institutional change that facilitate deinstitutionalisation and the transformation of institutional logics. Then, existing research that draws on the notion of institutional complexity is discussed. While previous scholarship emphasised the uniformity of institutional pressures, these accounts assume the co-existence of multiple logics and introduce a higher degree of agency into the institutional discourse. The last section emphasises the role of individual and collective agency in institutional transformation that characterises more contemporary studies.

2.2. A brief history of institutional theory

One of the most influential sociologists, Émile Durkheim (1895/1982, p. 45), defines sociology as “a science of institutions, their genesis and functioning”. For Hughes (1936, p. 180), the “only idea common to all usages of the term institution is that of some sort of establishment of relative permanence of a distinctly social sort.” Economists and political scientists have used the term institution primarily to refer to regulatory entities such as governmental organisations (see North, 1990; Scott, 2005a). Early sociological contributions emphasised normative elements of institutionalisation (e.g., Hughes, 1936; Parsons, 1951; see Jepperson, 2002 for a review). Those reflect a micro level interest in internalised rule and values, interpersonal ties and mutual obligations that introduce “a prescriptive, evaluative, and obligatory dimension into social life” (Scott, 2005a, p. 410). This strand of sociological institutional scholarship also recognises the importance of power dynamics, conflicts of interest, competing values, and consequently the role of leadership and agency in creating

and shaping institutions (see Hirsch & Lounsbury, 1997 for a review). Stinchcombe (1997, p. 17) stresses the high degree of human agency that underpins early institutional research in a review by remarking that institutions exist and persist because “somebody somewhere really cares”.

In a critical essay on the use of institutionalism in organisational studies, Suddaby (2010, p. 18) contends that “the core of institutional theory is to understand how organizations adopt and justify practices that are nonrational or distinctly separate from obvious economic motivations.” Earlier organisational sociologists focused on such nonrational practices within single organisations (B. R. Clark, 1960; Selznick, 1949, 1957). Those institutionalists, most notably Selznick (1949) in his study of the Tennessee Valley Authority, portrayed an organisation as a “living institution” (p. 9) that is “infused with value beyond the technical requirements of the task at hand” (p. 17). He found that formal goals and structures are subverted by informal practices that reflect “the beliefs and actions of those who have the power to define directions and interests” (Brint & Karabel, 1991, p. 352). In locating the source of institutionalisation in the vested interest of actors, scholars accentuated the importance of power dynamics, political trade-offs and conflicts that emerge from competing values and interests (Greenwood & Hinings, 1996). In line with sociological literature of the time, early organisational institutionalism is underpinned by a high degree of human agency (see DiMaggio & Powell, 1991; Greenwood & Hinings, 1996; Scott, 2005a for reviews). In the 1970s a new form of institutional theorising emerged in organisational studies (DiMaggio & Powell, 1983; J. W. Meyer & Rowan, 1977; Zucker, 1977). Responding to the prevailing notion of social actors as purposive and fairly rational that dominated the academic discourse, scholars began to display individuals and organisations as embedded in broader social structures (J. W. Meyer & Rowan, 1977; see J. W. Meyer, 2008 for a review).

In the introductory chapter of their seminal book, DiMaggio and Powell (1991) coin the term “new” (or neo-) institutionalism to distinguish a more structural perspective from the action-oriented, micro level focus that characterised the just outlined “old” institutionalism. In later contributions, differences between old and new institutionalism are debated (Hirsch & Lounsbury, 1997; Thornton et al., 2012) and sometimes labelled an “overblown distinction” (Suddaby, 2010, p. 15). Irrespective, neo-institutional researchers gradually shifted their attention to higher levels of analysis (DiMaggio & Powell, 1991). The

old institutionalism was interested in informal intra-organisational practices that were separate from obvious economic or technical motivations. New institutionalism, by contrast, stresses non-rational elements of formal organisational structures and processes (J. W. Meyer & Rowan, 1977). In doing so, institutionalists addressed an increased dissatisfaction with prevailing contingency theories that postulate a necessary fit between organisational elements and internal or external contingency variables (Donaldson, 2011). From an institutional point of view, individual and organisational choices are constrained not only by technological, informational, and resource boundaries but “by socially constructed limits that are distinctly human in origin” (Oliver, 1997, p. 699). Evoking the notion of social construction also points to a shift from the more individual norms and attitudes that characterised the older form of institutionalism (Scott, 2005a). The emerging theory, in contrast, emphasised cultural-cognitive elements such as scripts and mental maps shaped in social interaction (Berger & Luckmann, 1966; J. W. Meyer & Rowan, 1977). Hirsch and Lounsbury (1997, p. 415) underline the focus on macro level elements that characterise the new strand of institutional research when they contend that “the old institutionalism connects much more clearly to action whereas the new institutionalism connects more clearly to structure.” Earlier neo-institutional research examined how such “broad social and historical forces, ranging from explicit laws to implicit cultural understandings” (Orlikowski & Barley, 2001, p. 153) explain the homogeneity of organisational structures, processes and activities across “populations of organizations” (Suddaby & Lefsrud, 2010, p. 468).

The notion of ‘populations of organisation’ is indicative of the shift in level of analysis. Old institutional research was interested in single organisations embedded in local communities (Selznick, 1949). New institutionalists drew on the sociology of Pierre Bourdieu and his notion of relational ‘social fields’ (Bourdieu, 1977). In doing so, they emphasise the embeddedness of organisations and individuals in a broader social context (Suddaby & Lefsrud, 2010). Fields, according to Bourdieu, are “networks of social relations, structured systems of social positions within which struggles or manoeuvres take place over resources, stakes and access” (Bourdieu, 1990, p. 187). In Bourdieu’s theory of practice, fields represent “structured social contexts” (Crossley, 2001, p. 83) where actors compete against one another and perform socially-situated practices (Bourdieu & Wacquant, 1992; Emirbayer & Johnson, 2008; Noble & Watkins, 2003; Walther & Walther, 2014). In organisational studies, scholars

have predominantly evoked the notion of organisational field. This refers to “the totality of relevant actors [that], in the aggregate, constitute a recognized area of institutional life” (DiMaggio & Powell, 1983, pp. 148–149). An organisational field does not represent a particular type of organisation but “all the organizations that play one role or another in the activity in question” (Emirbayer & Johnson, 2008, p. 2). Organisational fields emerge through a process of structuration when actor socially construct a shared understanding of their environment through increased interaction and mutual awareness (e.g., Barley & Tolbert, 1997; DiMaggio & Powell, 1983; Giddens, 1984). Figure 2.1 integrates key terms ‘structure’, ‘field’, ‘actors’, and ‘agency’ into an illustrative framework that structures the literature review. The remainder of this section discusses these key concepts in the light of neo-institutional scholarship.

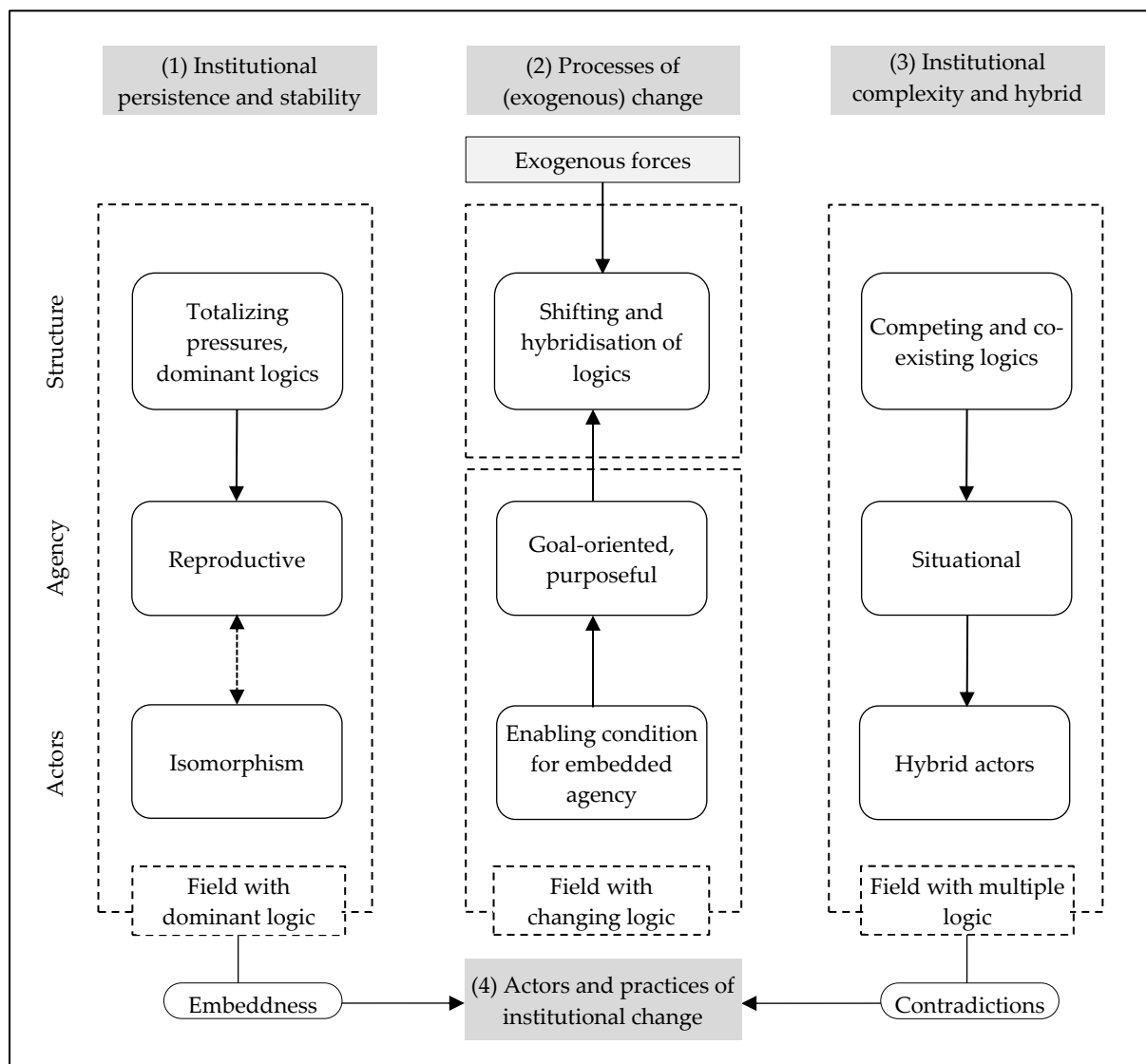


Figure 2.1: Four themes of neo-institutional theory

Suddaby, Viale and Gendron (2016, p. 3) contend that “at their core, institutions are macro-phenomenological social structures.” In line with institutional nomenclature, ‘structure’ in Figure 2.1. refers to institutions in their broadest sense. Thus, structure includes regulative institutions such as political regimes and legislation, social institutions such as collectively shared norms, values and beliefs and the core organizing principles—logics—that are associated with a specific societal domain (Friedland & Alford, 1991; Schildt & Perkmann, 2016; Scott, 1987, 2005a). ‘Field’ refers to an “context of sociocultural ideas and beliefs that prescribe appropriate and socially legitimate ways of doing things” (Greenwood et al., 2014, p. 1208). A field can be conceptualised as a relational system of actors who are collectively subjected to the influence of a shared socio-political structure. ‘Actors’ refers to those individuals and organisations who are “embedded in ongoing social systems that shape their interests and restrict their choices” (Scott, 2005a, p. 413). Finally, ‘agency’ in Figure 2.1 refers to any type of individual or collective action that is exercised by actors. Although used inconsistently in neo-institutional literature, action is often related to an actor’s “conscious choice” (Jepperson, 1991, p. 145). Agency connotes both habitual behaviour and the “conscious and purposeful departures from institutionalized social patterns” (Seo & Creed, 2002, p. 230).

At this point, the overlap of institutional theories with theories of practice (Bourdieu, 1977; Schatzki, Knorr-Cetina, & Savigny, 2001; Sztompka, 1991) and related structuration theories (Giddens, 1984) needs to be noted. In the most fundamental way, those meta theories postulate that any social action is grounded in some permanent social structure, but in turn this structure is continuously reproduced and altered by social action (Barley & Tolbert, 1997; Scott, 2005a). Although seminal neo-institutional scholarship refers to those intellectual foundations (DiMaggio & Powell, 1991; Zucker, 1987), subsequent research has not embraced a practice ontology; most existing literature is underpinned by a clear separation between macro- and micro level concerns. The logic that underpins Figure 2.1 is outlined briefly in the remainder of this section and discussed in much more detail in subsequent sections. It should be noted that the four themes of institutional scholarship are not presented in a strict temporal order. Although there is some chronological sequence in the seminal works that underpin each theme, they primarily reflect how institutional researcher have gradually shifted their attention from more structural to more agentic aspects of institutional stability and

transformation; at the same time, the conceptualisation of one dominant institutional logic was gradually replaced by an attention to multiple institutional logics.

As summarised by Lawrence and Suddaby (2006, p. 238), early neo-institutionalists have “characterised institutions as ‘totalizing’ structures that hold their subject actors captive”; the focus of research was on the structural aspect of institutions. Scholars identified ‘pillars’ of institutionalisation (Scott, 1995, 2001, 2008b), isomorphic pressures (DiMaggio & Powell, 1983; J. W. Meyer & Rowan, 1977) or dominant institutional logics (Thornton & Ocasio, 1999; Thornton et al., 2012) to explain homogeneity and persistence in organisation fields. Individuals and organisations were portrayed as highly embedded actors who reproduce institutions through habitual agency. Building on an increased dissatisfaction with the focus on stability, a set of researchers became interested in how and why macro level structures change over time. This second stream of institutional scholarship identified exogenous pressures, such as wars, economic crisis, or technological revolutions, that facilitate the transformation of a field’s dominant institutional logic (Oliver, 1992). The two themes introduced so far focus on the field level of analysis and depict a uniform institutional environment that actors face. A third theme of neo-institutional research emphasises the co-existence of multiple institutional logics that might prescribe contradictory behaviour (Friedland & Alford, 1991). This stream of scholarship gradually shifted its attention to lower levels of analysis and explored how actors (organisations and individuals) manage, cope with or exploit competing institutional prescriptions (Battilana & Dorado, 2010; Pache & Santos, 2010, 2013b; Smets, Jarzabkowski, Burke, & Spee, 2015). In this literature, scholars speak of hybrid actors who integrate multiple logics into their structure, processes, practices or behaviour.

Finally, the fourth strand of institutional scholarship focuses on actors and their role in institutional transformation. Earlier research in this domain focused on factors that enable actors (institutional entrepreneurs) to promote alternative institutional logics in their field (DiMaggio, 1988; Greenwood & Suddaby, 2006; Maguire & Hardy, 2009). Scholars have more recently shifted their attention to the practical activities, the institutional agency, of such actors (Lawrence & Suddaby, 2006). While much of this literature is underpinned by a notion of actors as relatively non-embedded, purposeful and rational, scholars recently attempted to strike a balance between the embeddedness of actors and the experienced contradictions

between institutional logics that facilitate reflective awareness and change (Seo & Creed, 2002; Smets, Morris, & Greenwood, 2012). The remainder of this chapter discusses each stream of literature to elaborate key insights and their respective shortcomings.

2.3. Origins of institutional stability

The conceptualisation of institutions as “indoctrinated” (K. Weber & Glynn, 2006, p. 1655) and “totalizing” (Suddaby, 2010, p. 17) macro level social structures that make alternatives “literally unthinkable” (Greenwood & Hinings, 1988, p. 302). Early neo-institutionalists were interested in explaining the persistence and uniformity of organisational arrangements in organisational fields that emerges from institutional prescriptions and proscriptions. They identify isomorphic pressures that originate from regulative, normative and cultural-cognitive ‘institutional pillars’ (DiMaggio & Powell, 1983; Scott, 1995, 2001, 2008a) and more recently dominant institutional logics (Ruef & Scott, 1998; Thornton & Ocasio, 1999) that “inexorably push toward homogenization” (DiMaggio & Powell, 1983, p. 148). Individuals and organisations are portrayed as highly embedded actors who reproduce social structures “without much reflection” (Garud et al., 2007, p. 95).

2.3.1 *Isomorphic processes in pursue of legitimacy*

Building on J. W. Meyer and Rowan's (1977) seminal work on isomorphism and legitimacy, early neo-institutional research emphasises pressures originating from socially constructed rule systems to explain homogeneity in organisational fields. The fundamental idea underpinning this stream of research is that embedded actors conform to societal expectations regarding organisational goals and means beyond their technical efficiency (Deepphouse & Suchman, 2008). Conformity to such pressures enhances an actor's legitimacy and, in turn, access to resources and survival changes (Scott, 1995).

Legitimacy is “a central concept in organizational institutionalism” (Deepphouse & Suchman, 2008, p. 49) ever since the earliest neo-institutionalists (J. W. Meyer & Rowan, 1977; J. W. Meyer & Scott, 1983a) evoked it. Legitimacy in institutional terms builds on Weber's (1922/1978) notion of legitimacy as conformity with social laws, norms and values and March's (1981) logic of appropriateness. In essence, the concept connotes that some actions, structures or processes within an organisational field are considered legitimate, while others are not (Deepphouse & Suchman, 2008). In his seminal work, Suchman (1995, p. 574) defines

legitimacy as “a generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions.” Based on a synthesis of the literature, Suchmann (1995) offers one of the most influential typologies of legitimacy, identifying three primary forms: pragmatic, moral and cognitive (Suddaby, Bitektine, & Haack, 2017). Pragmatic legitimacy refers to the “rational effectiveness” (Deephouse & Suchman, 2008, p. 5) or “technical superiority” (Suddaby et al., 2017) of organisational structures and individual behaviours. It rests on the ability to demonstrate outcomes such as economic benefits or practical usefulness (Suchman, 1995; Suddaby & Greenwood, 2005). Moral and cognitive legitimacy, in contrast, denote conformity with more implicit expectations beyond economic rationales (J. W. Meyer & Scott, 1983a). Moral legitimacy emerges from the congruence of actors and actions with cultural values and ideals (Suchman, 1995). Some actions might be legitimate in a pragmatic sense, but not meet expectations regarding their appropriateness in a particular social setting (Scott, 1995). Finally, cognitive legitimacy refers to more implicit support from stakeholders; it occurs when normative expectations become accepted as “as necessary or inevitable based on some taken-for-granted cultural account” (Suchman, 1995, p. 582). Cognitive legitimacy denotes the highest degree of institutionalisation when expectations are internalised to the extent that “their ‘social fact’ quality renders them the only conceivable, ‘obvious’ or ‘natural’ way to conduct an organizational activity” (Oliver, 1991, p. 148).

Around the same time that Suchmann (1995) published his typology, Aldrich and Fiol (1994) identified two types of entrepreneurial legitimacy, socio-political and cognitive, that are relevant to this thesis. Socio-political legitimacy refers to the degree key stakeholders “accept a venture as appropriate and right, given existing norms and laws” (Aldrich & Fiol, 1994, p. 648). This notion of socio-political legitimacy is similar to Suchmann’s (1995) conceptualisation of normative legitimacy, although it incorporates a degree of external acceptance that can be managed more directly within a political context (Deephouse & Suchman, 2008). Cognitive legitimacy refers to “the spread of knowledge about a new venture” (Aldrich & Fiol, 1994, p. 648) and the degree stakeholders understand new products or activities. Suchmann (1995) refers also to comprehensibility as the basis for cognitive legitimacy. Yet, his definition puts more emphasis on the taken-for-grantedness of social actions. While Suchmann (1995) merely characterises legitimacy as an inherent capacity,

Aldrich and Fiol (1994) suggest that legitimacy is actively attained through purposive efforts of individual or collective actors (Suddaby et al., 2017).

Scott (1995, 2001, 2005a) incorporates different forms of legitimacy in his influential three pillars framework. These describe the regulative, normative and cultural-cognitive elements of institutions that provide stability and meaning to social action (Thornton et al., 2012; Wooten & Hoffman, 2008). The regulative pillar connotes the demands of governmental authorities or regulatory bodies (Barley & Tolbert, 1997). They set formal and informal rules, policies or laws and perform monitoring and sanctioning activities (Scott, 1995). In doing so, they guide social action through legal obligations and the threat of negative consequences that result from non-compliance. The regulative pillar stresses instrumental behaviours that reflect the actor's preferences and self-interest; the normative pillar refers to conformity to moral expectations and obligations (Scott, 2008b). As such, it relies on the internalisation of norms and values and guides social action through evoking a sense of moral duty and the ascription of shame and dishonour for non-compliance (Muzio & Faulconbridge, 2013; Scott, 2005a). Finally, the cognitive pillar that Scott (2001, 2008b) termed 'cultural-cognitive' in later works operates on a more individual level of analysis. It refers to a shared conception of social reality and mental frames that actors draw upon to ascribe meaning to events (Zilber, 2008). According to Garud and colleagues (2007, p. 958), the cognitive pillar "guides action through the very categories and frames by which actors know and interpret their world." The cultural-cognitive pillar comprises the highest level of institutionalisation when social prescriptions are increasingly taken-for-granted and internalised (Scott, 2005b; Barley & Tolbert, 1997). Once norms, obligations or actualities take on a rule-like status, they provide common "templates for action which create unified or monolithic responses to uncertainty that lead to isomorphism" (Wooten & Hoffman, 2008, p. 57).

Embedded actors who face the same institutional environment increasingly adopt similar, isomorph, structures and processes in their quest for legitimacy. DiMaggio and Powell (1983) identified three types of isomorphic pressures that drive actors to adopt homogeneous forms of organising: coercive, normative and mimetic pressures. Coercive isomorphism relates to the regulative pillar of institutionalisation and involves some degree of force, persuasion or domination (DiMaggio & Powell, 1983). The state, non-governmental authorities or major resource providers can coerce actors to adopt particular organisational

forms or processes through legislation or through the withdrawal of resources (Leicht & Fennell, 2008; J. W. Meyer & Rowan, 1977). Thus, coercive isomorphism refers to a more pragmatic form of legitimacy based on a high degree of goal-oriented, economic rationality (DiMaggio & Powell, 1983; Scott, 2008b). Normative isomorphism results from the socialisation of embedded actors “into a set of beliefs that define specific organizational arrangements as the ‘best and customary’ way of organizing specific activities” (Leicht & Fennell, 2008, p. 433). According to DiMaggio and Powell (1983) normative pressures stem primarily from professional and trade associations that define collective training requirements, certification standards and networks between actors, that transcend organisational boundaries. The socialisation of actors through common educational trajectories and accreditation regimes prompts them to “view problems in a similar fashion [...] and approach decisions in much the same way” (DiMaggio & Powell, 1983, p. 153). Those collectively shared norms become infused into organisations, superseding localised organisational customs or efficiency requirements. Finally, mimetic pressures are based on attempts to imitate exceptionally successful organisations within a field. When faced with ambiguous problems and solutions, actors model their choices regarding organisational designs and behaviours based on those made by other actors perceived as elites in a specific field (DiMaggio & Powell, 1983; J. W. Meyer & Rowan, 1977; Tolbert & Zucker, 1983). Over time, such organisational structures and processes are diffused within the field through employee turnover, formal and informal interactions between actors, or their calculated promotion by consulting firms. Hence, mimetic isomorphism relates to the cultural-cognitive pillar when particular forms organising are gradually institutionalised as taken-for-granted amongst all actors (J. W. Meyer & Rowan, 1977; Scott, 1995).

In its focus on the uniformity in the institutional environment, this stream of literature tends to “privilege continuity and constraint in social structure” (Scott, 2008b, p. 76). Along the same line, Leca and Naccache (2006, p. 627) note the “traditional deterministic view, whereby institutional pressures explain actors’ actions and behaviours.” The presumed stability of homogenous structural constraints and the passive role of embedded actors was already critiqued by Friedland and Alford (1991) in the same volume that DiMaggio and Powell (1983) introduced the term neo-institutionalism. In their meta-theoretical framework, Friedland and Alford (1991) contend that societal-level ‘institutional logics’ must be taken into

account to properly explain institutional emergence and transformation. Those institutional logics, that Greenwood and colleagues (2010, p. 521) label the “master principles of society”, shape the interests and behaviour of embedded actors. They, in turn, constitute the foundation for potential institutional transformation.

2.3.2 *The institutional logics perspective*

Friedland and Alford (1991, p. 232) introduce the capitalist market, the nuclear family, the bureaucratic state, democracy, and the Christian religion as “the central institutions of the contemporary capital West”. Each of those institutions is associated with a fundamental logic: a set of material practices and symbolic constructions that constitute its organising principles. The central logic that underpins each of these institutions “constrains both the means and ends of individual behaviour and are constitutive of individuals, organizations, and society” (Thornton & Ocasio, 2008, p. 101). Leca and Naccache (2006, p. 632) summarise Friedland and Alford’s (1991) meta-theory by noting that “while institutions are the rules of the game, institutional logics are the underlying principles of the game.” The logic of the market focuses on the accumulation of capital and the commodification and pricing of human activity; The logic of the nuclear family is based on the unconditional commitments of members and reproductive needs; The logic of the state reflects regulation and bureaucracy that controls human activity; The logic of religion is underpinned by established universal truth based on moral principles, ideology and unconditional faith; Finally, the logic of democracy is based on the participation in the disruption or maintenance of regulative institutions through electoral votes (Friedland, 2009; Friedland & Alford, 1991; Thornton et al., 2012).

Whereas neo-institutionalism has focused on the intra-organisational level of analysis (the organisational field), Friedland and Alford (1991, pp. 240–242) maintain that society consists of three levels of analysis: individuals competing and negotiating, organisations in conflict and coordination, and institutions in contradiction and independence. All three levels are ‘nested’ and specify progressively higher levels of constraints and opportunity. To adequately understand society, all levels need to be considered. Individual behaviour can be explained only by taking the organisational and institutional context into account. This context can be understood only through individual consciousness and behaviour. Friedland and Alford’s (1991) conceptualisation of material and symbolic elements that characterise a

particular logic as mutually constitutive is similar to Giddens's (1984) of structuration and theories of practice in general. Thornton and Ocasio (2008, p. 104) argue in a review that the "[institutional logics perspective] suggests that while individual and organizational action is embedded within institutions, institutions are socially constructed and therefore constituted by the actions of individuals and organizations." Scholars claim that the perspective rejects both the methodological individualism of rational actor models, and the structural determinism that underpins most neo-institutional theory (Thornton et al., 2012). In a recent review, however, Zilber (2016a) notes that most institutional logics scholarship focuses on the macro level and suffers from a "top-down bias" (p. 148). Like most early neo-institutionalists, scholars ultimately conceptualise institutional logics as a macro level concept to explain stability and heterogeneity in organisational fields.

Ironically, Friedland and Alford (1991) introduce the notion of institutional logic to criticise the focus on similarity and the absence of agency that underpinned the neo-institutional scholarship of the time. In this context, Greenwood et al. (2014, p. 1213) argue that "a fundamental—albeit often ignored—assumption of the institutional logics perspective is difference." Indeed, in the second paragraph of their seminal work, Friedland and Alford (1991, p. 232) emphasise that institutional logics undeniably "shape individual preferences and organizational interests as well as the repertoire of behaviours". They then go on to argue that logics "are potentially contradictory" and individuals and organisations can transform an institutional arrangement "by exploiting those contradictions". Thornton and Ocasio (2008, p. 101) note that the "contradictions inherent in the differentiated set of institutional logics provide individuals, groups, and organizations with cultural resources for transforming individual identities, organizations, and society." For instance, the institution of religion that stresses morality and ethics might contradict the logic of the market in its focus on self-interest and profit maximisation (Thornton et al., 2012). The co-existence of multiple logics in society opens up room for agency. Faced with conflicting institutional demands, actors need to make choices regarding their compliance and non-compliance (Friedland & Alford, 1991; Johansen & Waldorff, 2017). In other words, normative and cognitive prescriptions that stem from institutions not only constrain embedded actors; incompatible and conflicting practices, values and norms can liberate actors and be used to gain strategic advantage.

While DiMaggio and Powell's (1991) neo-institutionalism has received considerable attention stability, Thornton et al. (2012, p. 41) note that "Friedland and Alford's (1991) ideas lay fallow for nearly a decade until in 1999 they were called to the attention of scholars by Thornton and Ocasio." The renewed interest in institutional logics did, however, underplay the prominence of contradictions between logics that is central to Friedland and Alford's (1991) seminal work. For instance, in much of their early work, Thornton and colleagues mention contradictions only in passing (Thornton, 2002; Thornton & Ocasio, 1999) or not at all (Thornton, Jones, & Kury, 2005). Conversely, this group of scholars added the professional logic, the community logic and the corporate logic to the five logics of market, state, democracy, family and religion mentioned by Friedland and Alford (1991). More importantly, they operationalise Friedland and Alford's (1991) meta-theoretical description by proposing fundamental elements or building-blocks of each logic (Thornton, 2002, 2004; Thornton et al., 2005; Thornton & Ocasio, 1999). The resulting exhaustive list of categories facilitated empirical differentiation between logics based on the language used by actors, their actions, their identities and so on. Table 2.1 summarises central categories of three ideal-typical logics, those of market, professional and corporate, that are particularly relevant for this thesis. Section 3.4.4, ideal-typical logics in professional settings, discusses each of them in more detail.

Categories	Market logic	Professional logic	Corporate logic
Root Metaphor	Transaction	Profession as relational network	Corporation as hierarchy
Source of Legitimacy	Share price	Personal experience	Market position of the firm
Source of Authority	Shareholder activism	Professional association	Board of directors, Top management
Source of identity	Faceless	Association with quality of craft, personal reputation	Bureaucratic roles
Basis of norms	Self-interest	Membership in guild & association	Employment in firm
Basis of attention	Status in market	Status in profession	Status in hierarchy
Basis of strategy	Efficiency and profit	Increase personal reputation	Increase size & diversification of firm

Table 2.1: Ideal-typical institutional logics. Source: Thornton et al. (2012).

The establishment of a set of ideal type facilitated the construction theory of and empirical research alongside an increase in the popularity of the concept. For instance, Johansen and

Waldorff (2017, p. 51) note an “almost explosive rise in the number of articles in international journals referring to institutional logics” in the last decade. However, the renewed interest in institutional logics often disregards Friedland and Alford’s (1991) fundamental conceptualisation of contradictory logics that give rise to agency and institutional transformation. Most research is instead underpinned by the notion that “only one logic can dominate in a stabilized field” (Cloutier & Langley, 2013, p. 362). Thus, although Friedland and Alford’s (1991) meta-theory questions the neo-institutional preoccupation with isomorphism and structural determination, scholars employ institutional logics in a very similar fashion. This is noted by Greenwood et al. (2010, p. 521) who note that “most attention has been given to how organizational fields and industries are structured by a ‘dominant logic’ that elicits an isomorphic response.” Most research on institutional logics can therefore be categorised into the first theme of institutional scholarship; arguably, scholars conceptualise a ‘dominant institutional logic’ in a very similar way to Scott’s (1995) pillars of institutionalisation. In so doing, logics are portrayed as purely top-down and actors as highly embedded when they embody institutional prescriptions and enact them habitually.

2.3.3 Enactment and embodiment of dominant logics

Institutions do not simply pre-exist but are constantly produced and reproduced in social interactions (Cornelissen, Durand, Fiss, Lammers, & Vaara, 2015). In earlier neo-institutional research, however, the reproductive element dominates the academic discourse. Scott (2008a, pp. 429–430) notes that neo-institutionalists viewed an actor’s institutional environment as “contexts imposing requirements and/or constraints on organizations [...] implying a determinant, top-down perspective.” Scholars speak of ‘institutional effects’ that macro level social structures exert on embedded actors (Jepperson, 1991; J. W. Meyer & Rowan, 1977). Actors are presumed to simply reveal a prescriptive institutional environment through their language, behaviour or the organisational arrangements they adopt. Institutional pressures or logics are assumed to be embodied and enacted by embedded actors. The terms enactment and embodiment are used interchangeably in institutional literature. While embodiment usually refers to organisational structure or processes and the cognitive internalisation of institutions by individuals, enactment denotes various form of localised actions that are informed by a broader cultural framework (Smets et al., 2015).

Embodiment. Building on the notion of legitimacy that stems from social expectations, early neo-institutionalists argue that specific organisational arrangements “become regarded as the appropriate, perhaps even the only way of doing things” (Greenwood & Hinings, 1988, p. 302). Meyer and Rowan (1977, p. 345) coin the term “institutionalized myths” to refer to rationalised expectations that are incorporated in formal and informal organisational arrangements. Empirically, the focus of early neo-institutional scholarship lay on public administration and health care (e.g., Covalski & Dirsmith, 1988; J. W. Meyer & Scott, 1983a; Tolbert & Zucker, 1983) and on professional fields such as law and accounting (e.g., Greenwood, Hinings, & Brown, 1990). Although the importance of informal activities is acknowledged, scholars primarily identify formal elements such as governance structures, control mechanisms or ownership arrangements that become “isomorphic with the myths of the institutional environment” (J. W. Meyer & Rowan, 1977, p. 340). The institutional logics perspective similarly emphasises the importance of “organizational forms as the embodiments or incarnations of institutional logics” (Kraatz & Block, 2008, p. 253). This stream of literature proposes an extensive list of ideal-typical ownership and governance arrangements that characterise a field at a certain point in time. Scholars identify other organisational level elements such as corporate strategies, identities or performance-evaluation processes that reveal a field’s dominant logic (see, for example, Faulconbridge & Muzio, 2016; Goodrick & Reay, 2011; Thornton et al., 2005; Thornton & Ocasio, 1999, 2008). Although much of this literature focuses on the field level, scholarship increasingly attends to the micro level foundation of institutional theory (Thornton & Ocasio, 2008). Powell and Colyvas (2008a, p. 277) argue that “institutional forces shape individual interests and desires, framing the possibilities for action and influencing whether behaviours result in persistence or change.” Much of this literature is also underpinned by a deterministic, top-down view (Zilber, 2016a). Scholars identify characteristic elements that are representative of all individuals in a specific social context, individuals being thought to embody a deterministic institutional environment in their social identities (R. E. Meyer & Hammerschmid, 2006), values and tacit knowledge (Barley & Tolbert, 1997; Pache & Santos, 2013b) or aspirations and attitudes (Thornton et al., 2012).

Enactment. Institutional theorists tend to use the term enactment in a loose way without referring to related theories (Jennings & Greenwood, 2003). Enactment typically

denotes some form of patterned behaviour characteristic of a specific institutional context. Describing a collective, socially established form of human action, Hughes (1936, p. 180) refers to individuals who are “behaving institutionally”. Oliver (1997, p. 669) speaks of “institutionalized activities” to refer to actions that tend to be “enduring, socially accepted, resistant to change, and not directly reliant on rewards or monitoring for their persistence to be enduring, socially accepted, resistant to change and not directly reliant on rewards or monitoring for their persistence.” Barley and Tolbert (1997, p. 102) contend that “institutionalization occurs when actors enact scripts that encode institutional principles”. The enactment of such scripts results in “observable, recurrent activities and patterns of interaction characteristic of a particular setting” (p. 98). Others refer to “institutional practices” (e.g., Friedland & Alford, 1991; Oliver, 1992; W. W. Powell & Colyvas, 2008a) that are enacted by embedded actors in concrete social situations. For scholars who draw on the institutional logics perspective, enactment typically refers to the material elements of a particular logic (Thornton et al., 2012). Enactment thus denotes some kind of performative accomplishment in contrast to cognitive elements that organise an actor’s thoughts and information (Reay & Jones, 2016). In the institutional logics literature, enactment refers either to “patterns in language” (Reay & Jones, 2016, p. 446) or to material practices. For example, McPherson and Sauder (2013, p. 174) note that institutional logics are “rhetorically enacted” through certain words and phrases. Material practices denote more bodily forms of action that are “recognizable and associated with an institutional logic” (Reay & Jones, 2016, p. 442). In the same way, Jarzabkowski and colleagues (2013, p. 47) refer to “practices as the material enactments of institutional logics”.

The enactment of institutions enables their maintenance and reproduction when practices and embedded routines are gradually taken-for-granted by actors (see Lawrence & Suddaby, 2006; W. W. Powell & Colyvas, 2008a). Garud (2007, p. 959) argues that institutional arrangements tend to be “reproduced without much reflection in practice”. “Processes of habituation precede any institutionalization” (Berger & Luckmann, 1966, p. 71) when the continued enactment of institutional logics reinforce and naturalise existing conventions (Barley & Tolbert, 1997; Friedland, 2009; Tolbert & Zucker, 1996). Enactment therefore does not necessitate a conscious choice by actors. Barley and Tolbert (1997, p. 102) argue that “enactment does not involve awareness or intentionality: actors simply behave according to

their perception of the way things are". The stream of literature discussed in this section is underpinned by a habitual or 'iterational' conceptualisation of human agency (Emirbayer & Mische, 1998). This mode of agency emphasises an actor's orientation towards the past, drawing upon "more or less tacit and taken-for-granted schemas of action" (Emirbayer & Mische, 1998, p. 975).

The continued enactment and embodiment of institutions in turn facilitates a field's structuration as it develops into a "recognized area of institutional life" (DiMaggio & Powell, 1983, p. 148). A highly institutionalised field is therefore characterised by the uniformity of institutional pressures. Battilana (2006, p. 656) argues that "one institutional logic tends to hold a dominant position in a field." Scholarly attention has consequently focused on identifying a field's "dominant logic [that] organizes and guides the behaviour of social actors" (Goodrick & Reay, 2011, p. 376). While institutional logics (see Table 2.1) are a societal-level concept, a dominant logic is believed to inspire a specific set of structures and practices in a given organisational field (Friedland & Alford, 1991; Gawer & Phillips, 2013). Scholars consequently seek to identify, describe and measure a field's dominant logic based on its representative elements (Reay & Jones, 2016). Scholars identified, for instance, the 'care logic' (Dunn & Jones, 2010) in health care, the 'editorial logic' (Thornton, 2002) in the publishing industry, the 'aesthetic logic' (Thornton et al., 2005) in architecture, or the 'fiduciary logic' (Smets, Morris, & Greenwood, 2012; Thornton et al., 2005; Whittle, Mueller, & Carter, 2016) in accounting and law as "a specific field-level manifestation of the logic of professions" (McPherson & Sauder, 2013, p. 174). These manifestations of the professional logics are typically portrayed in opposition to market and corporate logics that emphasise economic behaviour, self-interest, competition and hierarchy (Thornton, 2002). Existing scholarship identifies a 'business-like logic' (Reay & Hinings, 2009), a 'for-profit logic' (Tracey, Phillips, & Jarvis, 2011), a 'managerial logic' (Suddaby et al., 2009) or a 'commercial logic' (Greenwood et al., 2011) that all relate to the societal market and corporate logic.

Although the literature is extensive, most scholars evoke the term 'dominant logic' to distinguish organisational fields (R. Meyer & Höllerer, 2014). Some focus on geographic institutional fields and elaborate differences based on the underlying dominant logic; Faulconbridge and Muzio (2016) study law firms in two countries and distinguish between an English and an Italian professional logic. These differences in logics are reflected in

diverging organisational designs, remuneration systems, control mechanisms, vocational education systems, professional loyalties, and so on. They find that the English professional logic is characterised by a higher degree of commercialism than the Italian one (see also Smets, Morris, & Greenwood, 2012). In contrast, most studies on institutional logics show how a field's dominant logic differs at various points in time (e.g., Thornton et al., 2005; Thornton & Ocasio, 1999). While those studies speak of 'shifts' or 'changing' logics, they are ultimately interested in the period of stability when a field has settled on a new dominant logic.

2.3.4 Section summary and shortcomings

As illustrated in Figure 2.1, the first theme of institutional scholarship portrays institutions as deterministic macro level structures. Powell and Colyvas (2008b, p. 976) argue that this stream of literature views institutions as homogenising pressures that "obliged organizations to conform to the expectations of the fields in which they were members." Conformity with values and beliefs situated outside a field is said to enhance the legitimacy of organisational actors. Empirically, scholars focus on isomorphic processes in organisational fields as organisational designs gradually converge towards a uniform template for organising (Greenwood & Hinings, 1993; Hirsch, 2008; Jepperson, 1991). At the more micro level, scholarship portrays individuals as "cultural dopes" (W. W. Powell & Colyvas, 2008a, p. 277; see Garfinkel, 1967) and any "action as determined by institutional structures" (Hirsch & Lounsbury, 1997, p. 414). Recent scholarship increasingly draws on the notion of institutional logics that Suddaby and Greenwood (2009, p. 177) define as "broad belief systems that specify the boundaries of a field, its rules of membership, and the role identities and appropriate organizational arrangements of its constituent communities."

However, both literatures emphasise the similarity of structures, processes and practices that stems from institutional pressures or a field's prevailing logic. Heinze and Weber (2016, p. 157) argue that those "are entrenched in organizational routines, status orders, policies, and structures that hamper change and trigger resistance." Although the earliest conceptualisations of institutional theory in general (J. W. Meyer & Rowan, 1977; J. W. Meyer & Scott, 1983b; Selznick, 1949), and institutional logics in particular (Friedland & Alford, 1991) stress the importance of change and reflective agency, a unidirectional (top-down) perspective prevails also in contemporary institutional research (Zilber, 2016a). Most literature is

underpinned by the assumption of a uniform institutional environment that imposes “homogenous requirements on passive organizations” (Scott, 2008a, p. 430). In the context of institutional logics research, Greenwood et al. (2010, p. 521) note that this “focus on a dominant logic is surprising because most studies claim to be progeny of Friedland and Alford (1991) for whom organizational fields are always subject to multiple logics.”

The “overwhelming focus on isomorphism and similarity” (R. Meyer & Höllerer, 2014, p. 1221) ignores that even highly institutionalised arrangements can transform and be replaced over time. Calls to “attend not just to consensus and conformity but to conflict and change in social structures” (Scott, 2005b, p. 408) and to restore interest and agency in institutional analysis (DiMaggio, 1988; Friedland & Alford, 1991) have been made since the theories’ earliest formulations. Because neo-institutional theory as presented so far focuses on structural explanation for an actor’s choices, such calls are inherently problematic. Related to the broader ‘structure vs. agency’ debate, the ‘paradox of embedded agency’ (see Garud et al., 2007 for a review) is a key problem faced by neo-institutional scholarship. It refers, in essence, to the question of how actors can transform institutions if “their actions, intentions, and rationality are all conditioned by the very institutions they wish to change?” (Holm, 1995, p. 398). Moreover, a lack of attention to the micro-foundations of institutional dynamics has been noted throughout the past decades (e.g., Barley, 2008; Cloutier & Langley, 2013; Hallett & Ventresca, 2006; Hirsch & Lounsbury, 1997; W. W. Powell & Colyvas, 2008a; Zilber, 2016a). Actor refers typically to an “organization as a whole” (R. Meyer & Höllerer, 2014, p. 1223) and “individuals often disappear from institutional research” (Suddaby, 2010, p. 17). In this context, scholars note that a renewed focus on micro level actors should not only use discursive outputs to document institutional logics; researchers also need to attend to the material object and the day-to-day activities those inspire (e.g., Cloutier & Langley, 2013; Suddaby, 2010).

2.4. Exogenous institutional change

Although the concept of isomorphism dominates much neo-institutional scholarship, researchers have explored the transformation of institutional arrangements since the early 1990s (e.g., Davis, Diekmann, & Tinsley, 1994; A. D. Meyer, Brooks, & Goes, 1990; Oliver, 1992). Institutionalists initially linked the demise of institutional arrangements to disruptions

that were labelled “environmental jolts” (A. D. Meyer et al., 1990, p. 93), “exogenous shocks” (Beckert, 1999, p. 780; Fligstein, 1991, p. 317) or “unexpected, irrefutable events” (Oliver, 1992, p. 574). Located outside an organisational field, those pressures are portrayed as “smacking into stable institutional arrangements” (Clemens & Cook, 1999, p. 447). Others add that the “introduction of an external agent” (Suddaby & Lefsrud, 2010, p. 465) can trigger institutional change. All those disruptions introduce new ideas to a field, disturb consensus within a field and undermine taken for granted assumptions (see Dacin, Goodstein, & Scott, 2002 for a review). Early writers identified various categories of external pressures that facilitate deinstitutionalisation or the transformation of a field’s dominant logic. In this stream of literature, actors are usually assumed to passively enact and embody macro level transformations. However, some scholars also note that such disruptions yield opportunities for self-interested actors (Oliver, 1991).

2.4.1 External pressures for change

In her influential paper, Oliver (1992) argues that functional, political and social pressures delegitimise previously taken-for-granted institutional arrangements. Functional pressures are tied to events that “compromise or raise doubts about the instrumental value of an institutionalized practice” (Oliver, 1992, p. 571). They might arise from wars (Baron, Dobbin, & Jennings, 1986), technological disruptions (Garud, Jain, & Kumaraswamy, 2002), economic crises (Fligstein, 1991), competitive existences (Davis et al., 1994; Haveman, 1993; K. Lee & Pennings, 2002) or the publication of new research and books (Lounsbury, 2002). Lee and Pennings (2002) study Dutch accounting firms and changes in the field’s dominant organisational form. They link the emergence of a new prevailing organisational form to its superior economic performance in comparison with other organisational designs. Other scholars argue that institutional change in fields such the airline industry (Cho & Hambrick, 2006) or financial services (Lounsbury, 2002) were facilitated by governmental deregulation that resulted in increased competition. Political pressures refer to a change in the interests and power of political institutions that previously supported and legitimised existing institutional arrangements (Dacin et al., 2002; Oliver, 1992). Townley (2002) studies the introduction of business planning and performance measures in Canadian museums. She identifies broader governmental initiatives to enhance “public accountability [and to] demonstrate improved managerial competence in the public sector” (p. 163) as the driving force behind this change.

Edelman, Abraham and Erlanger (1992) analyse the introduction of new legislation in the United States that allowed employees to sue their employer for being wrongfully discharged. They argue that those legislative changes precipitated significant alterations in organisational human resource practice. Notably, they also find that the actual threat emanating from the new legislation was significantly overstated by personell and legal professionals within organisations in attempts to enhance their own prestige and influence. Oliver (1992, p. 569) argues that political pressures can also emerge from a “rise in power of intra-organizational entrepreneurs who offer unique or visionary solutions to organizational problems and succeed in mobilizing political support for the imposition of alternative organizational values and activities.”

Oliver (1992, p. 575) notes that functional and political pressure necessitate “that members of the organization consciously acknowledge the need to discard institutionalized practices and then act on this recognition.” Functional and political pressures thus assume a high degree of rational and intentional behaviour in response to exogenous threats. Institutional change might, however, also arise as a “by-product” (Oliver, 1992, p. 575) of broader shifts in the socio-economic environment or intra-organisational changes. Social forces such as shifting societal expectations or preferences undermine institutionalised practices that were previously considered as appropriate or superior. Rao, Monin and Durand (2003) study the abandonment of classical cuisine in France and the emergence of the nouvelle cuisine movement. They link the change to “wide-ranging social and economic movements” (p. 803) that transformed French society towards an emphasis on individualism, spontaneity and virtuosity.

Intra-organisational social pressures might result from increased workforce diversity or high turnover. In this context, Oliver (1992, p. 575) argues that new employees “with backgrounds and experiences that differ from existing members [...] diminish consensus and unquestioning adherence to taken-for-granted practices.” Empirically, the emergence of new actors that are draw upon alternative logics and “bear the imprint of distant social worlds” (W. W. Powell & Sandholtz, 2012, p. 96) has been noted in a range of studies as facilitative of institutional change. For instance, Zilber (2002) analyses the inter-organisational dynamics in an Israeli rape crisis centre and finds that the recruitment of new members who carried an alternative logic challenged the firm’s dominant logic. Similarly, the diversification of

organisations into adjacent organisational fields has been shown to facilitate of institutional change (Greenwood & Hinings, 1996; Thornton, 2002).

2.4.2 De-institutionalisation and shifting logics

According to Oliver (1992, p. 563), external pressures trigger deinstitutionalisation, which she defines as “the erosion or discontinuity of an institutionalized organizational activity or practice.” Scholarship has identified processes of deinstitutionalisation in the abandonment or rejection of predominant organisational practices (Oliver, 1992), employment models (Ahmadjian & Robinson, 2001), preferences for consumer goods (Hiatt, Sine, & Tolbert, 2009), pesticide use (Maguire & Hardy, 2009) or organisational designs (Davis et al., 1994). For instance, Davis et al. (1994) explore the deinstitutionalisation of the conglomerate firm, the dominant corporate form in the United States in 1980. They argue that deinstitutionalisation was facilitated once less-diversified firms outperformed their conglomerate competitors. Ahmadjian and Robinson (2001) study the deinstitutionalisation of permanent employment in Japan between 1990 and 1997. They find that permanent contracts as the dominant form of employment demised, once downsizing became socially acceptable and regulatory barriers were lifted. Maguire and Hardy (2009) analyse the decline of DDT as the predominant insecticide in the United State. They exemplify it as a case of “outsider-driven deinstitutionalization” (p. 148) that was pushed by environmental activists and facilitated by a broader change in environmental and social values. Kraatz and Zajac (1996) argue that technical and economic pressures in conjunction with changing student preferences compelled U.S. liberal arts colleagues to adopt practices that were diametrically opposed to fundamental organisational values.

Deinstitutionalisation is believed to produce an “institutional vacuum” (Suddaby & Viale, 2011, p. 428) which interested actors can exploit through local innovations (Hiatt et al., 2009; Tolbert & Zucker, 1996). These innovations have the potential to diffuse to a wider range of actors and reinstitutionalise as a new institutional imperative (Boxenbaum & Jonsson, 2008; Greenwood et al., 2002; Strang & Meyer, 1993). A central assumption in the literature is that one set of institutional arrangements gradually replaces another. This is echoed by Scott (2001) who argues that

it is useful to place studies of deinstitutionalization in a broader context of institutional change, since the weakening and disappearance of one set of beliefs and practices is likely to be associated with the arrival of new beliefs and practices. (p. 184)

Literature on institutional logics is similarly underpinned by an interest in the replacement or substitution of logics. A plethora of scholarship shows that the dominant logic of particular fields changes over time (Lounsbury, 2002; Thornton et al., 2005; Thornton & Ocasio, 1999). Based on the assumption that logics are inherently incompatible and in conflict, alternative logics are “presented as challengers that usurp previously dominant logics” (Goodrick & Reay, 2011, p. 376). In line with the literature on deinstitutionalisation, scholars assert that a shift in logics is “often catalysed by exogenous shocks” (Glynn & Lounsbury, 2005, p. 1031). Haveman and Rao (1997) show how technological and social changes facilitated a shift in the institutional logic that guided the Californian thrift industry and led to the emergence of new organisational forms. Goodrick and Reay (2011) draw on a historical case study of U.S. pharmacists. They show that the field’s dominant logic shifted from a dominant market logic in the early 1900s, to a professional logic between 1945 and the 1990s and finally to an increased dominance of the corporate logic in the present day.

Although the literature that focuses on such shifts in logic is extensive, a common theme is the emergence of the market logic in fields previously dominated by a professional logic. This shift has been observed in health care organisations (Scott, 2000), accounting (Greenwood & Hinings, 1996), higher-education publishing (Thornton, 2002; Thornton & Ocasio, 1999) or in architecture (Thornton et al., 2005). Whereas the notion of shifting logic assumes a fully-fledged replacement of one logic by another, ‘hybridisation’ or ‘blending’ of logics denotes less-dramatic changes (e.g., Pache & Santos, 2010; Skelcher & Smith, 2015; Thornton et al., 2012). According to Thornton et al. (2012, p. 165) hybridisation occurs when “logics are transformed by combining dimensions of diverse logics”. Glynn and Lounsbury (2005) show that the aesthetic logic that traditionally informs the practices of the symphony orchestra yielded, in the face of declining orchestral resources, to a more commercially oriented market logic. The rise of the market logic did not, however, imply a rejection of aesthetic concerns. Thornton et al. (2005) study architectural firms and argue that the field’s

dominant logic “marries” (p. 141) traditional professional concerns around aesthetics and safety with the market logic’s focus on efficiency.

2.4.3 Actors responses to field-level changes

Although this literature acknowledges that multiple logics can co-exist in any given field, such situations are usually portrayed as an exceptional instance in times of crisis or change; they are conceptualised as a transitory phenomenon “until one side or the other wins and the field reforms around the winning dominant logic” (Reay & Hinings, 2009, p. 632). As discussed in section 2.3, this literature ascribes a predominantly passive role to actors. Organisations and individuals are assumed to enact or embody shifts in the dominant logic guiding the field. This deterministic view is visible in McPherson and Sauder's (2013, p. 166) statement that “changing logics within a field influence the strategies and practices of organizations.” Spicer and Sewell (2010) introduce the notion of dominant organisational logics that they conceptualise as a meso level construct that lies between a field’s dominant institutional logic and the sense-making activities of intra-organisational actors. Spicer and Sewell (2010, p. 914) argue that if “institutional logics are changing (however gradually), then it can be reasonably assumed that organizational logics will also change.” Drawing on longitudinal, field-level studies, research in this area shows that a shift in a field’s dominant logics materialises in adopted organisational structures, processes or social practices and in individual rhetoric or social behaviour.

Thornton's (2002) seminal study identifies a shift from a professional to a market logic in the publishing industry by examining “the link between industry level culture and organizational-level social structure and routines” (p.82). She identifies significant changes in the industries predominant authority structures, growth strategies or organisational identities and concludes that “organization-level social structures and routines [...] were carriers of institutional logics” (p.97). On a more micro level, Meyer and Hammerschmid (2006) show how a shift in institutional logics from an administrative orientation to a managerial logic in the Austrian public sectors is reflected in the social identities of executives and the vocabulary employed. Spence and Carter (2014) observe a shift from a dominant professional logic to a commercial-market logic in large accounting firms. They argue that this required professionals to “disembody, at least partially, previously embodied [professional] logics” (p.

959) that emphasised technical excellence and public interest. In this study, actors who were able to gradually embody an emerging commercial logic that was “more highly valued by the surrounding field” (p. 960) had significantly better career prospects.

Although this literature is still underpinned by a rather passive conceptualisation of actors, it also increasingly acknowledges that actors can exploit field level conditions for their own advantage (Edelman et al., 1992; Lander, Koene, & Linssen, 2013; Oliver, 1991). In her seminal work, Oliver (1991, p. 145) emphasises the lack of “attention to the strategic behaviours that organizations employ in direct response to the institutional processes that affect them.” In response, Oliver (1991) integrates institutional and resource dependence theory and proposes five types of strategic responses, these of acquiescence, compromise, avoidance, defiance and manipulation, to institutional pressures that organisational actors can draw upon (see Pache & Santos, 2010, for a review). Acquiescence denotes the most passive strategy when organisations comply with institutional demands through conscious or unconscious adherence. Compromise refers to more tactical responses where organisations balance institutional expectations and organisational goals. Avoidance strategies are attempts of “concealing their nonconformity” (Oliver, 1991, p. 154) through ceremonial adherence or symbolic acceptance of institutional norms and rules. Defiance refers to more aggressive strategies and can entail the ignoring of institutional expectations or to actively “assault, belittle, or vehemently denounce institutionalized values and the external constituents that express them” (Oliver, 1991, p. 157). Finally, manipulation strategies purposefully change or exert power over institutional expectations or constituents that enforce them. This can involve lobbying, building coalitions and the strategic use of institutional ties.

On its surface, this literature is predicated on a high degree of projective agency that emphasises the “choice, awareness, proactiveness, influence, and self-interest that organizations exhibit in response to institutional pressures” (Oliver, 1991, p. 173). Oliver (1991) also introduces field-level factors that predict under which conditions actors will draw upon a certain strategic response. She argues that the most pro-active ones—defiance and manipulations—will transpire in environments where norms and practices are not fully institutionalised or exogenous pressures introduce uncertainty and conflicting demands into the field. As such, Oliver (1991) framework and subsequent research does essentially not addresses the paradox of embedded agency. Ultimately, a change in environmental

conditions remains the main source of institutional change. Actors who are embedded in highly institutionalised fields are still predicted to conform with institutional expectations.

2.4.4 Section summary and shortcomings

In their review, Suddaby and Lefsrud (2010, p. 469) note that “a central concept of neo-institutional theory is the notion that institutional change is often the result of an exogenous and rare event.” Existing scholarship has explored the impact of such events onto the institutional imperatives of specific fields (Oliver, 1992; Rao et al., 2003; Thornton et al., 2005). Under the labels deinstitutionalisation or shifting dominant logics, research shows that such events facilitate the replacement of institutionalised values, norms and practices as they lose their taken-for-granted status and are replaced by alternatives. Although this literature acknowledges that field-level disruptions provide opportunities for strategic action, the ‘practical-evaluative’ (Emirbayer & Mische, 1998) dimension of agency dominates (Oliver, 1991, 1992); ultimately, actors are expected to passively enact and embody the shift in institutional demands. Conflicting logics are assumed to co-exist during times of transition until a field stabilises around a winning logic or a hybrid logic that integrates the two previous logics (Reay & Hinings, 2009). While most scholars focus on the field level of analysis, some also begin to recognise the importance of intra-organisational actors and the meaning they ascribe to external events (e.g., Edelman et al., 1992). By and large George and colleagues (2006, p. 347) maintain, however, that “theorists have paid less attention to factors within the organization that shape organizational responses to pressures in the institutional domain.” Greenwood and Hinings (1996, p. 1042) similarly call to explore why and how the intra-organisational commitment to prevailing logics erodes in order to identify the “precursors of ‘deinstitutionalisation’ within the organization”.

2.5. Institutional complexity and hybrid actors

Whereas the literature discussed in the previous section focuses on a shift in field-level logics from one dominant to another, existing research has also shown that multiple logics can co-exist in any given field (Battilana & Dorado, 2010; Marquis & Lounsbury, 2007; Reay & Hinings, 2009; Thornton & Ocasio, 1999). Under various labels such as ‘institutional complexity’ (Greenwood et al., 2002), ‘institutional multiplicity’ (Greenwood et al., 2010), ‘institutional pluralism’ (Kraatz & Block, 2008) or ‘institutional ambidexterity’ (Jarzabkowski,

Smets, Bednarek, et al., 2013), those situations are not framed as a transitory phenomenon. They are instead portrayed as a permanent condition that both require and enable actors to exercise some degree of agency (Friedland & Alford, 1991; Greenwood et al., 2011; Zilber, 2011). Most scholars depict multiple logics as “competing or conflicting belief systems” (Reay & Hinings, 2009, p. 631) that evoke “inconsistencies and conflict” (Hardy & Maguire, 2008, p. 203). Others acknowledge potential complementarity where logics reinforce or supplement each other (Greenwood et al., 2010; Smets et al., 2015). Irrespectively, this stream of literature more explicitly acknowledges the multiplicity of institutional logics that is integral to Friedland and Alford's (1991) seminal work.

In cases where two or more logics claim jurisdiction over a single situation, the resulting “jurisdictional overlap” (Thornton et al., 2012, p. 57) requires actors to “interact with their environments over determining what rules must be followed” (Hirsch, 2008, p. 786). While the co-existence of multiple logics in any field is taken as a given, scholarly attention focuses on the engagement of embedded actors with pluralistic institutional demands (Lounsbury & Christiansen, 2013; Pache & Santos, 2010). Greenwood and colleagues (2011) give the example of academic science departments where the logics of science and of commerce might prescribe different behaviours. In turn, they ask how “organizations experience and respond to these seemingly incompatible, socially derived, expectations?” (p. 318). Institutional complexity in this literature is consequently not portrayed as an exogenous state but as an endogenous accomplishment by individuals and organisations (Schildt & Perkmann, 2016). Earlier studies show how organisations rely on passive strategies such as decoupling to respond to institutional complexity (J. W. Meyer & Rowan, 1977; Oliver, 1991; see Boxenbaum & Jonsson, 2008 for a review). More recently, scholars started to explore how the availability of multiple logics can create opportunities for actors by providing a greater repertoire of frameworks (Battilana & Dorado, 2010; Pache & Santos, 2013b; Smets et al., 2015). In both streams of literature, actors are frequently labelled as hybrids. Those individuals and organisations are able to cope or manage diverse logics and incorporate them into structures, processes and behaviours (Greenwood et al., 2011; Pache & Santos, 2010, 2013b).

2.5.1 *Defensive responses to institutional complexity*

Most existing research emphasises the ‘incompatible’ (e.g., Greenwood et al., 2014), ‘competing’ (e.g., Lounsbury, 2007; Marquis & Lounsbury, 2007) or ‘contradictory’ (e.g., Bjerregaard & Jonasson, 2014; Friedland & Alford, 1991; Thornton & Ocasio, 2008) nature of logics and the “inherent rivalry when multiple logics exist” (Reay & Hinings, 2009, p. 631). Irrespective of the specific terminology, this refers to situations “when the means and ends stemming from different logics diverge” (Thompson, Purdy, & Gehman, 2016, p. 161). Townley (2002) builds Weber's (1922/1978) sociology and observes “a clash of value spheres between the cultural and the economic” (p. 175) that transpired through the introduction of business planning and performance measures in a cultural organisation. As Chapter 3 will show in more detail, a plethora of research correspondingly maintains that professional logics are incompatible with expectations stemming from market and corporate logics (e.g., Freidson, 2001; Thornton et al., 2012). Building on this notion of incompatibility, earlier scholarship identifies defensive responses of organisations when faced with competing institutional demands. Scholars argue that organisations draw upon decoupling and compartmentalisation strategies to signal superficial adherence to multiple logics (Greenwood et al., 2011; J. W. Meyer & Rowan, 1977; Oliver, 1992).

Meyer and Rowan (1977) coin the term ‘decoupling’ when formal organisational structures are decoupled from internal activities. Decoupling refers to the strategic response that Oliver (1991) labels ‘avoidance’, aimed at “disguising nonconformity behind a facade of acquiescence” (p. 154). From this point of view, a dominant logic continues to guide the core activities of an actor, while the alternative logic is enacted merely ceremonially in peripheral activities (Besharov & Smith, 2014; Scott, 2005a; Thornton et al., 2012). For instance, Westphal and Zajac (1994) study the introduction of long-term incentive plans in CEO compensation contracts. Although organisations adopted those plans symbolically through public announcements, few implemented them because they clashed with the firm’s dominant logic. Fiss and Zajac (2006) identify a case of decoupling when publicly traded German companies increasingly claimed a shareholder value orientation in annual reports but did not implement corresponding practices. Lok (2010) studies the emergence of “enlightened shareholder-value logic” that emphasises the social responsibility of institutional investors. Although actors rhetorically endorsed the alternative logic, the dominant “shareholder-value logic” remained

core to their identity and trading activities. Other scholars find empirical cases of decoupling in the solely symbolic commitments to environmental concerns that organisations express in response to growing societal pressures (Greenwood et al., 2011; Lyon & Maxwell, 2011). Actors draw upon decoupling tactics mainly for “the purposes of impression management to receive certain advantages” (Thornton et al., 2012, p. 58). Cloutier and Langley (2013, p. 362) note that decoupling explains “why behaviors associated with formerly dominant logics tend to persist, even when a field’s dominant logic has shifted.” By decoupling practices from symbolic signals, actors are able to create an appearance of conformity with a competing set of institutional demands (Oliver, 1991).

Compartmentalisation describes a structural solution to institutional complexity. Greenwood et al. (2011, p. 350) argue that compartmentalisation refers to “a form of decoupling whereby an organization gives only ceremonial and symbolic commitment to certain logics while preserving a core identity.” According to Jarzabkowski et al. (2013, p. 38), compartmentalisation reduces institutional complexity “by keeping apart competing logics and the practices and people that enact them.” For instance, Edelman (1992) studies the organisational responses to the introduction of equal employment opportunity law in the United States. She finds that organisations created roles and departments to signal compliance without necessarily reducing actual employment discrimination. Cooney (2006) offers the example of a non-profit organisation that trains welfare recipients in their own in-house business. She argues that the organisation manages the tension between for- and non-profit logics by maintaining a highly un-integrated, multidivisional form. The business and social service side of the studied organisation were each independently run, with separate budgets, goals and operating procedures. Greenwood et al. (2011, p. 354) coin the term “structural hybrid” to describe such organisations where “separate subunits deal with particular logics [and] different mindsets, normative orders, practices and processes [are compartmentalised]”. Researchers recognise, however, that compartmentalisation encumbers collaboration and “denies fruitful interaction between logics” (Smets et al., 2015, p. 935). Internal conflicts between actors might also arise between actors when multiple logics exist within an organisation (Pache & Santos, 2010). Battilana and Dorado (2010), for example, highlight how a micro-finance organizations faced growth challenges because employees enacted competing logics in their activities. Whether the result of such contestation will lead to the adoption or

dismissal of a new logic, or the co-existence of multiple logics, will depend on the political processes of interaction that take place between actors inside the organisation.

2.5.2 *Strategic responses to institutional complexity*

Defensive responses to institutional complexity suggest that actors seek to avoid conflicts that arise from co-existing logics and, openly or covertly, continue to comply with a field's dominant logic. A more recent strand of scholarship shows how some actors manage these conflicts strategically and reconcile competing logics (Cloutier & Langley, 2013; Kraatz & Zajac, 1996; Pache & Santos, 2010). In this literature, individual and organisation actors are portrayed as the "embodiment or incarnation of *multiple logics*" (Kraatz & Block, 2008, p. 244, emphasis in original). At the organisational level, Greenwood et al. (2011, p. 352) coin the notion of blended hybrids that "combine and layer 'practices' taken from different logics into a single organization." At a micro level, Pache and Santos (2013b, p. 28) speak of "multicultural individuals" who identify with and are able to draw upon more than one logic. Such hybrid actors are typically assumed to be better positioned when dealing with increasingly complex and interconnected problems (Battilana & Lee, 2014; Kirkpatrick & Noordegraaf, 2015; Schildt & Perkmann, 2016).

At the organisational level, most studies assume that "that organizations wittingly manage their responses to multiple logics" (Greenwood et al., 2011, p. 352). Existing contributions show that organisations develop specific mechanisms or structural arrangements that accommodate competing demands. Building on the notion of blended hybrid, Schildt and Perkmann (2016, p. 3) speak of structural blending when a "newly salient logic [is] integrated into the mainstream functions of the organization". Tracey et al. (2011) analyse entrepreneurial household catalogue businesses that employ homeless people. They show that those organisations bridge the for-profit "retail logic" and the non-profit "homelessness support logic" by integrating practices and approaches from both. Although the studied firm was based on a conventional retail business model, it supported employees with literacy and numeracy training, sold only fair-trade products or offered permanent instead of commission based employment. Mair, Mayer and Lutz (2015) analyse organisations who embody a social welfare logic and a commercial logic. They observe a "playful engagement with prescriptions from different logics" (p. 729) as organisations developed

innovative governance practices and organisational processes that integrated dual organisational goals. Battilana and Dorado (2010) examine two pioneering commercial micro-finance organisations in Bolivia that combined a non-profit “development logic” and a for-profit “banking logic”. Their findings stress the importance of recruitment and socialisation practices; the organisation employed practitioners who were not steeped in either of the logics and then socialised them into a desired set of behaviours and values. A range of scholars emphasise a coherent hybrid identity that incorporates synergic elements into a new singular identity (Greenwood et al., 2011; Jay, 2013; Lok, 2010; R. E. Meyer & Hammerschmid, 2006; Skelcher & Smith, 2015; Zilber, 2016a). Kraatz and Block (2008, p. 251) argue that hybrid organisations need to “forge durable identities of their own”. A common theme in this literature is that hybrid organisations construct an organisational identity based on their distinctiveness from non-hybrid organisations (Battilana & Dorado, 2010; Battilana & Lee, 2014; Greenwood et al., 2011; Mair et al., 2015).

At the micro level, Jarzabkowski et al. (2013, p. 42) argue that blended hybrid organisations rely on “individuals to strike an appropriate balance” between competing logics. Greenwood et al. (2011, p. 356) speak of individuals “who are able to understand, and are sensitive to, the expectations and requirements of constituencies of multiple logics.” Such actors are typically assumed to possess some knowledge or skills outside their main domain of expertise (Blomgren & Waks, 2015; Pache & Santos, 2013b). Hence, those abilities are often related to multi-disciplinary education or prolonged work experience in contexts characterised by institutional complexity (Noordegraaf, 2011). For instance, Pache and Santos (2013b, p. 26) suggest that such individuals “may have dual degrees [or] extensive cross sectoral experience”. Scholars also note the importance of physical spaces where actors who draw upon competing logic are able to interact and reconcile their competing interests (e.g., Heinze & Weber, 2016; Kellogg, 2009).

Based on an increased acknowledgement that institutional complexity is a permanent condition, scholars began to explore “what individuals inhabiting these contexts do to enact different logics” (Jarzabkowski, Smets, Bednarek, et al., 2013, p. 42). McPherson and Sauder (2013) draw upon a 15-month ethnographic study of a drug court to investigate how actors from different backgrounds, including probation officers, clinicians, public defenders and state attorneys, employ institutional logics in their micro level interactions. They argue that

while most institutional theory presumes that professionals adhere closely to the logics of their professional groups, actors exercise a great deal of agency in their everyday use of logics; both in terms of which logics they adopt and for what purpose. Smets and colleagues (2015) conducted an ethnographic case study of reinsurance trading in Lloyds of London. They find that individuals balance a “community logic” and a “market logic” in their everyday work, drawing on segmenting, bridging or demarcating tactics depending on the situation’s specific demands. These findings emphasise the “situational sensitivity” of actors that, as the authors claim, “has been lacking in institutional thought” (p. 960).

2.5.3 Section summary and shortcomings

In a recent essay, Greenwood and colleagues (2014, p. 1217) argue that “in some contexts, competing or incompatible logics may be a relatively permanent feature and attention is being given to how this plays out.” Echoing this assertion, scholars are gradually shifting their attention from the field level to the organisational level and recently to the individual level of analysis, and explore how actors respond to institutional complexity (Besharov & Smith, 2014; Kraatz & Block, 2008; Lander et al., 2013; Pache & Santos, 2010, 2013a, 2013b). Earlier research shows that organisational actors who face such institutional complexity respond by compartmentalising competing logics in different locales or organisational units (J. W. Meyer & Rowan, 1977; Oliver, 1991). Greenwood et al. (2011, p. 354) label such organisations “structurally differentiated hybrid” maintaining that while compartmentalisation facilitates stability, it impedes cooperation and triggers conflicts (see Smets et al., 2015). In contrast, scholars note the “more far-reaching potential” (Noordegraaf, 2015, p. 193) of so called “blended hybrids” (e.g., Besharov & Smith, 2014; Greenwood et al., 2011; Skelcher & Smith, 2015). While defensive strategies seek to minimise the influence of alternative logics, blending suggests that the witting integration of multiple logics can be a source of advantage for organisations and individuals (Greenwood et al., 2014; Schildt & Perkmann, 2016).

Thornton et al. (2012, p. 175) call “to get inside organizations and understand [...] how strategic responses to such complexity are conceptualized and implemented.” To date, however, only a limited amount of research explores the mechanisms and practices that organisation and individuals employ to reconcile conflicting logic from within (e.g., Pache & Santos, 2013a; Smets et al., 2015). Most of this literature studies newly formed organisations

(e.g., Battilana & Dorado, 2010; Tracey et al., 2011) or organisations that are already considered hybrids (e.g., Mair et al., 2015). By doing so, they dismiss the conflicts and challenges that inevitably arise when an established organisation transitions towards a hybrid form of organising. Schildt and Perkmann (2016) recently called to study the process of organisational hybridisation that they define as “a change process whereby organizations abandon their existing organizational settlement and transition to a new one, incorporating a newly salient logic” (p. 1). In particular, Schildt and Perkmann (2016) encourage researchers to “more fully consider the relationship between institutional complexity and organizational change [when organisations] embrace a previously unfamiliar institutional logic” (p. 5) and “members of the organization are called to reconsider the relevance of the organizing principles associated with the various institutional logics” (p. 4). Organisational hybridisation as a process intuitively necessitates some kind of social action by embedded actors within those organisations. While intra-organisational insights into the specific context of organisational hybridisation are largely missing from the literature, a general interest on actors and agency is characteristic of most contemporary research on institutional transformation.

2.6. Actors and the practices of institutional transformation

Increasingly dissatisfied with the deterministic nature of neo-institutional scholarship, researchers have focused their attention on embedded actors as sources for endogenous institutional change since the early 1990s. Change in this stream of literature is not described as the result of shocks originating from outside a particular field, but as emergent from efforts by individuals or organisations within the field. As illustrated in Figure 2.1, one stream of literature focuses on the characteristics of actors and the conditions that enable and motivate them to promote alternative institutional arrangements (e.g., Dacin et al., 2002; DiMaggio, 1988; Hardy & Maguire, 2008; W. W. Powell, 1991). The key question that drives this literatures is “when and why actors or ‘agents’ do not conform to social convention and, instead, challenge the institutional fabric by initiating nonisomorphic action” (George et al., 2006, p. 347). In contrast, a more recent stream of scholarship pays closer attention to the practical activities involved in institutional change (Lawrence & Suddaby, 2006).

2.6.1 Focus on actors: Enabling conditions for embedded agency

Under the label of institutional entrepreneurship, one set of scholars focuses on the characteristics and conditions that enable actors to transform “from unreflective participation in institutional reproduction to imaginative critique of existing arrangements” (Seo & Creed, 2002, p. 231). The foundation for this scholarly conversation can be found in DiMaggio's (1988) call for bringing back interest and agency into neo-institutional analysis. DiMaggio (1988) introduced the notion of institutional entrepreneurs, defined as “organized actors with sufficient resources [who] see in them an opportunity to realise interests that they value highly.” To understand the characteristics and conditions that enable those actors “to envision and promote alternative arrangements” (Hardy & Maguire, 2008, p. 200), subsequent scholarship evokes Bourdieusian sociology and related schools of thought. Researchers have identified the characteristics of an organisational field and an actor's social position in the field as facilitating institutional entrepreneurship (Battilana et al., 2009; Hardy & Maguire, 2008; Smets & Reihlen, 2012).

Field characteristics. Fligstein (1997, p. 397) notes that institutional stability and change “depends very much on whether or not an organizational field is forming, stable or in crisis.” Drawing on this notion, publications differentiate between emerging and mature fields to explore the precipitative condition for institutional entrepreneurship (Greenwood & Suddaby, 2006; Smets & Reihlen, 2012). Emerging fields are characterised by localised and weakly entrenched “proto-institutions” (Lawrence, Hardy, & Phillips, 2002, p. 281) and actors that “recognize some degree of mutual interest” (Maguire, Hardy, & Lawrence, 2004, p. 659) around “central issues” (Hoffman, 1999). Such fields, however, lack the coordinated efforts of actors, formalised rules or widely diffused practices (Battilana et al., 2009). Most of the initial studies on institutional entrepreneurship were conducted in such contexts where a high degree of uncertainty and ill-formed institutional pressures open up a significant number of opportunities for motivated actors to pursue their interests (Garud et al., 2002; Maguire et al., 2004; Rao, 1994). Examples for such “relatively unconstrained spaces” (Maguire et al., 2004, p. 674) are the Whale-Watching industry on Vancouver Island (Lawrence & Phillips, 2004), the rise of the socially responsible investment industry (Déjean, Gond, & Leca, 2004) or HIV/AIDS treatment advocacy in Canada (Maguire et al., 2004). In focusing on emerging fields, however, those studies essentially do not address the paradox of embedded agency. Ultimately, actors

in such fields are relatively disembedded and less subjected to institutional pressures (Reihlen & Werr, 2015).

Actor's position. Mature fields are characterised by a strong mutual awareness of actors and industry associations that promote the interest of central actors and taken-for-grantedness of dominant “institutional logics and the social behaviors encoded within them” (Greenwood & Suddaby, 2006, p. 28; Scott, 2008a). As discussed in section 2.4, change in those fields was typically attributed to external shocks. Hoffman (1999, p. 353) notes that such disruptive events “can sharply end what has become locked in by institutional inertia [...] forcing the initiation of unorthodox experiments that diverge from established practice.” While all actors within a field are affected by external pressures, however, not all of them embrace opportunities to diverge from the status quo in the same way (Battilana, 2011). Building on Bourdieu’s notion of fields as “structured spaces of positions” (Bourdieu, 1993, p. 73), scholars identified the actor’s “subject position” (Maguire et al., 2004) or “social position” (Battilana, 2006) as enabling institutional entrepreneurship.

Building on the concept of social position, endogenous change in major fields is typically ascribed to “disadvantaged actors” (Scott, 2005a, p. 414) who are located “at the margins of an organizational field” (Battilana & D’Aunno, 2009, p. 40; Haveman & Rao, 1997; Leblebici, Salancik, Copay, & King, 1991). For instance, Powell (1991, p. 198) argues that “innovation and diversity will be more likely to come from the periphery of organizational fields [and hence from actors] that are least subject to isomorphic pressures.” Because the dominant institutional arrangements reflect the interests of a field’s central actors, such peripheral actors are assumed to be more motivated to challenge the status quo (Smets & Reihlen, 2012). Hensmans (2003) studies institutional change in the American music industry. He shows that change was driven by the peer-to-peer file-sharing service Napster that he labels “a revolutionary, a disruptive challenger” (p. 365). Battilana (2006) draws on the concepts of social position and field to understand individual level conditions that motivate actors to engage in institutional entrepreneurship. She proposes that individuals in lower status organisations or in lower status social groups within a given organisational field are more likely to conduct divergent change. However, a focus on an actor’s peripheral position does not fully address the paradox of embedded agency either. Those actors are ultimately thought to be less embedded and more aware of alternatives (Garud et al., 2007).

Resources and capital. Other scholars draw on Bourdieu's concept of capital, or more broadly on the resources that enable institutional entrepreneurship (Battilana et al., 2009). According to Bourdieu's (1990) theory of practice, actors within any field have access to and struggle to accumulate three main forms of capital: economic, social and cultural. Economic capital refers to material forms of capital, such as monetary wealth, access to resources and property rights (Everett, 2002; Noble & Watkins, 2003). In institutional entrepreneurship research, scholars argue that these resources can compensate for negative costs of divergent change or be used to convince others to support a proposed change (Battilana et al., 2009; Demil & Bensédine, 2005; Greenwood et al., 2002). Bourdieu and Wacquant (1992, p. 124) define social capital as "the totality of the resources that may be called upon by sole virtue of being one of a network of durable social relations [...] not simply connections, but the added value which membership in a group brings." Social capital is deemed valuable only if it can be converted into some form of power and resources (De Clercq & Voronov, 2009; Everett, 2002). Institutional entrepreneurs can draw upon those networks to diffuse new ideas (Maguire et al., 2004) or to mobilise and orchestrate supportive collective action (Hwang & Powell, 2005; Lawrence et al., 2002). The third form, namely cultural capital, is typically framed as the most important in Bourdieu's sociology. Cultural capital may manifest in embodied, objectified and institutionalised forms (Bourdieu, 1997; Bourdieu & Wacquant, 1992; Everett, 2002). In its embodied form, cultural capital refers to technical abilities, knowledge or language skills. Objectified cultural capital manifests in tangible artefacts such as books or writings. Institutionalised cultural capital materialises in certificates of "cultural competence" (Everett, 2002, p. 63) that are awarded by academic or professional institutions. In this context, institutionalists have identified "specialist expertise" (Empson, Cleaver, & Allen, 2013, p. 808) or "technical skills" (Suddaby et al., 2016, p. 10) as enabling institutional entrepreneurship.

Although concepts of capital, social position and field are frequently evoked in studies of institutional change, few address the fundamental relational conceptualisation of Bourdieu's meta theory. Along the same lines, Emirbayer and Johnson (2008) note in a review that the "relational nature of capital is only partially grasped" (p. 3) by organisational scholars who draw on Bourdieu's sociology. According to Bourdieu, the sole exigence of capital does not confer any power. Capital becomes valuable only "insofar as it is accorded positive

recognition, esteem, or honor by relevant actors within the field” (Emirbayer & Johnson, 2008, p. 12). Bourdieu speaks of symbolic capital if any form of capital “reflects the system’s assumption about the usefulness of capital” (Walther & Walther, 2014, p. 10; Bourdieu, 1977, 1984) and confers authority, reputation and prestige. Symbolic capital as such constitutes a field specific form of capital that accumulates through prolonged engagement with the field (Emirbayer & Johnson, 2008; Everett, 2002). Symbolic capital, in turn, enables actors to “impose definitions of phenomena on other field participants” (De Clercq & Voronov, 2009, p. 400). This makes Bourdieu’s notion of capital as explaining institutional entrepreneurship inherently problematic. Voronov and Vince (2012, p. 63) note that actors “amass and conserve the field-specific capital”. In turn, the access to capital “is the key determinant of his or her position in the field [...] such that an agent with greater access to the field’s capital takes on a more dominant position in the field.” Because fields are established through a process of structuration, “the values and beliefs (logics) of [the most powerful actors] come to be reflected in the dominant logic” (Reay & Hinings, 2009, p. 631). Central actors might have the capital to initiate institutional change, yet they lack the motivation as they are advantaged by the prevailing institutional arrangements. Disadvantaged actors may, in turn, have an incentive to engage in institutional entrepreneurship but lack the resources necessary for the implementation of a vision for divergent change (Garud et al., 2007; Hardy & Maguire, 2008).

Social skills. Most literature on institutional entrepreneurship identifies organisations as the central actor in institutional transformation. In contrast, research that focuses on individuals who engage in institutional entrepreneurship remains limited (Battilana et al., 2009). This holds especially true for individuals who act as institutional entrepreneurs within their organisations (see Battilana, 2006, 2011; Empson et al., 2013 for exceptions). Some contributions which focus on the individual level of analysis identify an actor’s formal authority or social position within the organisation as enabling conditions for institutional transformation. Others draw on Fligstein’s (1997, 2001, 2013) notion of social skills. Fligstein (1997, p. 397) defines those as an actor’s “ability to motivate cooperation in other actors by providing those actors with common meanings and identities in which actions can be undertaken and justified.” According to Fligstein and McAdam (2011) social skills have three dimensions: Cognitive (IQ, knowledge), empathetic (emotional intelligence), and communicative (language skills). However, social skills should not be understood as an

individual attribute, but rather as an ability to relate to a broader social context. Socially skilled actors have a “highly developed cognitive capacity for reading people and environments” (Fligstein, 2013, p. 43). Institutional entrepreneurs who possess high levels of social skills are sensitive to the extant social logics that guide their field; they can draw selectively on this context to frame a vision that resonates with other actors (Battilana et al., 2009; Fligstein, 2001; Maguire & Hardy, 2006; Pache & Santos, 2013b). Suddaby and Viale (2011) argue that social skills emerge from an actor’s capital. Central actors, in turn, can be assumed to have higher levels of capital because, after all, they know better ‘how to play the game’ (see Lupu & Empson, 2015; Voronov & Vince, 2012). Suddaby et al. (2016) argue therefore that both Fligstein’s (1997) and Battilana’s (2006) concepts of social skill and social position tend to privilege the role of incumbent actors who seek to maintain an existing order rather than change it.

To recap, the literature on institutional entrepreneurship discussed so far emphasised the entrepreneurial aspects of the concept and underplays the institutional one. Suddaby (2010, p. 15) notes that this stream of scholarship presents actors as “hypermuscular supermen, single handed in their efforts to resist institutional pressure, transform organizational fields and alter institutional logics.” By focusing on disadvantaged actors and unstable fields, however, scholars lose sight of the embeddedness of actors that is central to institutional thought (Smets & Reihlen, 2012). The question remains whether, and how, central actors can transform institutional arrangements. After all, they are assumed to be highly embedded and consequently lack the “motivation, awareness, and openness necessary for institutional entrepreneurship” (Greenwood & Suddaby, 2006, p. 44). Such elite actors are thought to be “invested in, committed to, and advantaged by existing structural arrangements” (Garud et al., 2007, p. 962) and unable to “see beyond prevailing recipes” (Greenwood & Suddaby, 2006, p. 29). To overcome the paradox of embedded agency, Battilana (2006) notes that researchers need to refocus their attention to the role played by individuals in institutional phenomena. While Battilana (2006) herself draws on the already introduced concepts of social position and field, others call to incorporate Bourdieu’s conceptualisation of habitus into institutional analysis (Hills, Voronov, & Hinings, 2013; Lawrence, Suddaby, & Leca, 2011; Malsch & Gendron, 2013).

Habitus. The notion of field and capital as conceptualised by Bourdieu and others are utilized frequently in organisational studies in general and by neo-institutionalists in particular. However, the third concept of Bourdieu's major constructs, that of habitus, features far less prominently in the literature (Emirbayer & Johnson, 2008). For Bourdieu, habitus refers to "systems of durable, transposable dispositions" (Bourdieu, 1990, p. 53) that develop in the process of socialisation as the social structure of an actor's world is internalised. The habitus can accordingly be conceptualised as an embodied form of cultural capital. The notion of transposable dispositions indicates that habitus is not a stable property, but is acquired, developed and transformed through an individual's life history (Bourdieu, 1990; Noble & Watkins, 2003). Bourdieu distinguishes between two major forms of habitus: the primary habitus that is acquired through childhood and linked to social status of parents, and the secondary habitus that builds on the primary but is formed through education and subsequent life experiences (Bourdieu, 1984, 1997; Walther & Walther, 2014). The dispositions of the habitus predispose actors to select from a limited range of strategies that can be conceived and are "most likely to succeed in light of their resources and past experience" (Swartz, 2012, p. 106). These strategies materialise in visible patterns of habit, language, behaviour, manners and beliefs: in practices (Bourdieu, 1990; Witman, Smid, Meurs, & Willems, 2011, p. 482). Despite its individualised and embodied form, however, an actor's habitus "reflects a shared cultural context" (Adams, 2006, p. 514). Bourdieu uses the term *doxa* to refer to a field's "conventional wisdom" (Fligstein & McAdam, 2011, p. 20), "common sense" (Everett, 2002, p. 66) or what "goes without saying" (Bourdieu & Wacquant, 1992, p. 168). The habitus "engenders all the thoughts, all the perceptions, and all the actions consistent with those conditions and no others" (Bourdieu, 1977, p. 95). Witman et al. (2011, p. 482) note that "through the habitus [embedded actors] take the logic and the social world for granted."

Reflecting on the notion of the habitus as discussed so far, it is usurping that the concept is typically associated with iterational agency and infrequently evoked by scholars who study institutional change. For instance, in her work on enabling conditions for institutional entrepreneurship, Battilana (2006) relies on Bourdieu's conceptualisation of fields and social position to explain under what conditions individuals are enabled to enact as institutional entrepreneur. Yet she deliberately excludes the notion of habitus because it leaves "almost no room for agency, and thereby for social change" (p. 656). However, Boyer (2003,

p. 70) argues that “while a superficial reading may appear to suggest a view of social reproduction as inevitable, [Bourdieu’s] entire analytical work tends towards identifying the factors governing institutional change and transformation” (translated by Malsch and Gendron, 2013, p. 874). Also Bourdieu himself emphasises the generative, active, and inventive capacities of habitus (Bourdieu, 1990, p. 55; Gomez & Bouty, 2011). While the habitus is formed through long exposure to a social space, individuals are continuously exposed to multiple social spaces, both sequentially and simultaneously. This might lead to heterogeneity amongst actors embedded in the same field (Vaughan, 2002). Malsch and Gendron (2013, p. 875) content that “far from being at the root of an unending process of social reproduction, the habitus is located at the crossroads between individual strategies and the constraints of structure.” For instance, Hills et al. (2013, p. 130) argue that more attention to the habitus of actors can explain why some institutionalised logics “are internalized and become ‘second nature’, while others are adhered to more ceremonially.” Similarly, Malsch and Gendron (2013, p. 875) call to attend to the diversity of habitus in a field to explain why actors “may react differently in situations of crisis or rapid change”. Emirbayer and Johnson (2008, p. 30) add that these differences might “allow organizational members to see windows of opportunity hidden to other members of their own organization or to members of other organizations.”

2.6.2 Focus on agency: Micro-practices of institutional change

Whereas the literature discussed in the previous section explores why certain actors become motivated to promote new institutional arrangements and what enables them to do so, more recently researchers shifted their attention to the practical actions involved. In the context of institutional entrepreneurship, scholars speak of the “activities of institutional entrepreneurship” (Maguire et al., 2004, p. 658) or the “processes of institutional entrepreneurship” (Hardy & Maguire, 2008, p. 198). In a review, Smets and Reihlen (2012, p. 302) note in this context that scholarly attention migrated “from questions of who the entrepreneurs are and where they are located to what they do and how they do it.” Under the labels ‘institutional agency’ (Monteiro & Nicolini, 2014; Suddaby, 2015), a “practice approach to institutional change” (Smets, Morris, & Greenwood, 2012, p. 879) or “institutional work” (Lawrence & Suddaby, 2006) a related stream of scholarship attends more broadly to the social actions involved in creating, reproducing, and changing institutions. While activity based

research on institutional entrepreneurship focuses on actors who create or change institutions, this literature also explores the social action involved in maintaining or disrupting existing institutional arrangements. Both scholarly conversations, however, attend to the micro level of institutional dynamics by highlighting the importance of actions, activities or practices involved (Lawrence et al., 2013; Lawrence, Suddaby, & Leca, 2009; Lawrence & Suddaby, 2006; Zilber, 2013).

The relationship of those accounts with the broader 'practice turn' in social science has to be noted (see Schatzki, Knorr-Cetina, & Savigny, 2001). Lawrence and Suddaby (2006, p. 219) label their perspective a "practice perspective on institutions" and state the sociology of practice (Bourdieu, 1977; Giddens, 1984) as a major foundation for their concept of institutional work. Suddaby, Seidl and Lê (2013, p. 331) argue correspondingly that the institutional work movement "draws heavily from practice theory" and suggest that the two approaches "are evolving toward common theoretical and empirical space". Most research on institutional work, however, falls short of acknowledging their practice-based roots; researcher often disregards the embeddedness of actors, portraying actions as overly intentional and directed towards a preferred institutional arrangement (see Smets & Jarzabkowski, 2013; Smets, Morris, & Greenwood, 2012 for exceptions). Drawing on Feldman and Orlikowski (2011, pp. 1240–1241) contributions that draw upon the institutional framework can thus be categorised as an "empirical approach to practice [because] they emphasize the importance of human agency in producing organizational reality without explicitly drawing on practice theory or practice philosophy."

Based on a synthesis of neo-institutional scholarship, Lawrence and Suddaby (2006) introduce the concept of institutional work that they define as "the purposive action of individuals and organizations aimed at creating, maintaining and disrupting institutions" (p. 215). For each of these three categories of action, those of creating, maintaining and disrupting, they elaborate specific practices and offer empirical examples based on existing research. Although most scholars who subsequently evoked the concept focus on one of the three categories, others acknowledge that all of them may occur simultaneously when institutions are transformed (Empson et al., 2013). A new institutional arrangement might necessitate the disruption of the old one and the maintenance of the emerging one. The next paragraphs will

discuss each of the three categories briefly and then focus on existing scholarship that explores the intra-organisational dynamics involved.

Creational work. Creational work refers to the practices through which interested actors create or define new institutions (Lawrence & Suddaby, 2006). This category incorporates the action-based lens on institutional entrepreneurship (see Battilana et al., 2009; Hardy & Maguire, 2008). In a review, Battilana et al. (2009, p. 86) identify “the creation of a vision and the mobilization of allies” as the key activities in institutional entrepreneurship. Lawrence and Suddaby (2006) link the creation of institutions to the mobilisation of political support through activities such as lobbying, networking or advertising (Suchman, 1995). Creational institutional work might involve the establishment of formal certification and accreditation processes (Lawrence & Suddaby, 2006), technical or legal production standards (Lawrence, 1999) or professional codes of conduct (Adamson, Manson, & Zakaria, 2015). Other scholars refer to the establishment of formal rules that confer property rights (Empson et al., 2013; Lawrence & Suddaby, 2006). Lawrence and Suddaby (2006) contend that the construction of identities is a central form of creational work. For instance, Oakes and colleagues (1998) study the introduction of formal business planning procedures in museums. They show that the government department responsible for the implementation worked to reorient the identities of museum employees from being researcher towards entrepreneur and risk taker. Lounsbury (2001) demonstrates that a link between the occupational identity of recycling program managers to broader social movements promoted the diffusion of recycling practices.

Another form of creational work constitutes the establishment of normative relationships between actors (Lawrence & Suddaby, 2006). These might refer to networks between firms that offering similar services (Adamson et al., 2015), actors that share the same goals (Guler, Guillén, & Macpherson, 2002; Monteiro & Nicolini, 2014) or who face the same problems (Leblebici et al., 1991). Lawrence and Suddaby (2006) refer to the artful leverage of taken-for-granted practices in order to articulate and legitimise new ones. Hargadon and Douglas (2001), for instance, show that Edison attempted to institutionalise electrical lighting by mimicking the dominant gas lighting rather than by emphasising the differences between the two technologies. Zilber (2008, p. 158) similarly argues that “institutional entrepreneurs need to balance novelty and tradition, as they try to frame new (or changing) practices in ways that will provide them legitimacy and will not raise too much resistance.” Thus, they need to

frame their goals and tactics based on the dominant logic of a field (David, Sine, & Haveman, 2012; Haveman & Rao, 1997). Others use the term 'translation' when new ideas and practices are adjusted to meet the expectations stemming from a dominant logic (Boxenbaum, 2006; Sahlin-Andersson, 1996). Creation work also entails the labelling of the new institution, its presentation in a compelling form or the theorisation of a new idea as a solution to a perceived problem in the field (Greenwood & Suddaby, 2006; Greenwood et al., 2002, 2002; Kitchener, 2002; Monteiro & Nicolini, 2014; Orsato, den Hond, & Clegg, 2002). Finally, educating actors in the knowledge and skills required to draw upon alternative logics facilitates the institutionalisation of new practices (Lawrence & Suddaby, 2006; Lounsbury, 2001; Lounsbury & Crumley, 2007; Perkmann & Spicer, 2008).

Maintenance work. According to Lawrence and Suddaby (2006), institutions are maintained by ensuring the actors adherence to a normative and regulative rule system. This can involve state-imposed incentive and penalties (Baron et al., 1986; Lawrence & Suddaby, 2006), regular audits of actors (Guler et al., 2002; Leblebici et al., 1991) or professional and industry associations that oversee an actor's conduct (Greenwood et al., 2002). Referring to normative elements, maintenance work might entail public shaming and praising (Angus, 1993; Zietsma & Lawrence, 2010) or the mythologisation and glorification of the past (Lawrence & Suddaby, 2006; Lockwood & Glynn, 2016). At an intra-organisational level, maintenance work has been related to organisational routines such as recruitment practices (Zilber, 2002) or performance measurement systems (Empson et al., 2013).

Disruptive work. This final type of institutional work refers to the attack of mechanisms that lead members to comply with institutions (Lawrence & Suddaby, 2006; Oliver, 1992). These might involve legal action (Jones, 2001), lobbying for changes in technology standards (Leblebici et al., 1991), or the presentation of new evidence that questions the effectiveness of current arrangements (Holm, 1995). While those actions are initiated typically by powerful actors, disruption has been shown to accelerate when social and institutional pressures that maintain the status quo gradually diminished (Ahmadjian & Robinson, 2001). Empirical examples are elite firms who introduce novel practices within their organisation and non-elite firms who gradually adopt those (Greenwood & Suddaby, 2006; Sherer & Lee, 2002). Disruptive work also occurs by "undermining core assumptions and beliefs" (Lawrence & Suddaby, 2006, p. 235). Empson et al. (2013) study institutional change within UK law firms.

They find that the hire of non-lawyers who introduced “counter-cultural” (p. 827) ideas facilitated the disruption of taken-for-granted organisational arrangements. Suddaby and Greenwood (2005) show that disruptive institutional work entails rhetorical strategies that expose contradictions in a field’s dominant logic.

Intra-organisational institutional work. Although Lawrence and Suddaby (2006) emphasise that institutional work is done by both organisations and individuals, subsequent scholarship focuses mostly on organisations as unified actors. In the context of changing institutional logics, Reay and Hinings (2009, p. 632) note that researchers have shown “how field-level actors facilitated replacement of one dominant logic with another, but they gave little attention to actors inside organizations.” Only recently have scholars focused their attention on processes of hybridisation within organisations (Heinze & Weber, 2016; Schildt & Perkmann, 2016). Heinze and Weber (2016) study “change toward institutional pluralism [where] incumbent organizations must begin to integrate diverse logics in their operations” (p. 157). They study the institutional work carried out by “institutional intrapreneurs” that they define as “agents of new logics within organizations” (p. 157). Drawing on qualitative data from two health care organisations, they analyse the intrapreneurial tactics adopted by such actors when they promote an “integrative medicine logic” that challenged the “logic of conventional health care.” They highlight the establishment of formal “free spaces” that they define as “arenas for interaction that are outside of the incumbent institutional order, or protected from it” (p. 158). They show also that intrapreneurs crafted trading zones to interact with actors’ adherent to the dominant logic.

The literature discussed in this sub-section explores the institutional agency that Zilber (2002, p. 236) defines as “the social actions that create, reproduce, and change institutions”. As in the literature on institutional entrepreneurship, however, many contributions lose sight of the embeddedness of actors. They often remain silent where the ideas for new institutional arrangements came from. After all, actors “who are truly embedded are not supposed to desire, imagine, or realize alternative ways of doing things” (Maguire, 2008, p. 675). Along the same lines, Suddaby (2010, p. 15) notes that the “management journals are now full of empirical examinations of institutional agency. But, in many ways, they have overshot the mark.” In other words, while the portrayal of actors in the literature discussed in sections 2.3. and 2.4. depicts them as overly passive, this stream of literature emphasises the projective and

unrestricted agency of actors, mainly organisations, as they purposefully promote institutional arrangements that align with their interests. In contrast, scholars increasingly draw on Seo and Creed's (2002) contradiction framework that reconciles institutional embeddedness of actors and transformational agency. This framework integrates the notion of institutional complexity (discussed in section 2.5), reflective awareness of human actors that emerges from experienced institutional contradictions and institutional agency, what Seo and Creed (2002) term 'praxis' where actors engage in social action directed at the transformation of existing social arrangements.

2.6.3 Institutional contradictions and praxis

In the last decade, Seo and Creed's (2002) contradiction framework has attracted a considerable amount of attention amongst institutionalists. Seo and Creed (2002) adopt a dialectical perspective, proposing four sources of institutional contradictions that can trigger an actor's awareness and subsequent institutional change: (1) legitimacy that undermines functional inefficiency, (2) adaptation that undermines adaptability, (3) intra-institutional conformity that creates inter-institutional incompatibilities, and (4) isomorphism that conflicts with divergent interests (Seo & Creed, 2002, pp. 226–229). These contradictions are assumed to intensify over time as organisational fields institutionalise.

The first source of institutional contradictions relates to increased inefficiencies that result from conformity to institutional arrangements. Over time, those inefficiencies accumulate as new optimal solutions are continuously not pursued. Second, once actor's adopt to an institutional imperative, neo-institutional theory predicts that they resist further adoption irrespective of potential benefits (W. W. Powell, 1991). Institutionalisation thus generates unresponsiveness to changes in the external environments that accumulates over time (Jepperson, 1991). Third, Seo and Creed's (2002) relate inter-institutional incompatibilities to Friedland and Alford's (1991) conceptualisation of contradictions in societal institutional logics. Whereas the literature discussed in sections 2.3. and 2.4. evokes the notion of institutional logic as a method of analysis to reveal a field's dominant logic or a shift thereof, Seo and Creed (2002) draw on Friedland and Alford's (1991) meta theory to reconcile individual agency and institutional structure (Thornton & Ocasio, 2008). They thus more fully acknowledge a fundamental difference between Friedland and Alford's (1991)

ideas and other seminal institutional research that emphasise the uniformity of an actors institutional environment (e.g., DiMaggio & Powell, 1991; Scott, 1995). Although one logic is assumed to be dominant in one particular field, Seo and Creed (2002) incorporate the fundamental assumption that all fields are “to a greater or lesser extent, subject to multiple logics arising from core institutions of society” (Suddaby & Greenwood, 2009, p. 177; Friedland & Alford, 1991). Over time, as heterogeneity and interconnectedness between institutionalised sectors intensifies, inter-institutional contradictions become an increasingly common part of social life. Institutional contradictions manifest when actors are exposed to more than one field, new members join or non-adaptability renders institutional arrangements more vulnerable to external shocks (Clemens & Cook, 1999; Greenwood & Suddaby, 2006; Rao et al., 2003; Reay & Hinings, 2005). Seo and Creed (2002) predict an increased misalignment in the embedded actor’s interests because “institutional arrangements are likely to reflect the ideas and goals of the more powerful political contestants in the social arena” (p. 229). As a field institutionalises, the interest of non-dominant actors will be increasingly disregarded, making them in turn more likely to act as change agents.

The ongoing experience of those four contradictions can “trigger actors’ reflective capacity, enabling them to take some critical distance from existing institutional arrangements” (Battilana et al., 2009, p. 75; Jarzabkowski, Smets, Bednarek, et al., 2013). Institutional logic thus do not simply constrain embedded actors. In contrast, their inherent contradictory nature can also trigger reflective awareness and open up spaces for exploitation, provoking “consciousness and action to change the present order” (Seo & Creed, 2002, p. 225; Benson, 1977). In their framework, Seo and Creed (2002) refer to this form of institutional agency as praxis: the “free and creative reconstruction of social patterns on the basis of a reasoned analysis of both the limits and the potentials of present social forms” (p. 225). Seo and Creed (2002) identify the mobilisation of actors and subsequent collective action as key elements of praxis. Drawing on Fligstein’s (1997) notion of social skills, they argue that the mobilisation of actors will depend on the skills of change agents to adopt and deploy the available institutional logics.

Smets and colleagues (2012) draw empirically on these ideas in their study of emergent hybrid practices within a multi-national law firm. In this research, hybrid practices integrate

elements from an English “client-service logic” that highlights the commercial value of legal advice, and a German “fiduciary logic” that emphasises “unbiased expert judgment with little regard for commercial implications” (p. 885). Smets and colleagues (2012) find that such practices emerged once lawyers engaged increasingly in cross-national transactions and experienced institutional complexity as part of their day-to-day work. The encounter of novel complexity made “practitioners reflect and step outside existing arrangements to search for new accommodations” (p. 892). Pressured by the urgency to accomplish their tasks, and the consequences of failure, actors integrated both logics depending on the situation at hand. Through continued shared work experiences and trainings, positive feedback from clients and recruitment of ‘cosmopolitans’ who “thrive on the international nature of assignments” (p. 886) hybrid practices were gradually re-institutionalised as the new imperative.

2.6.4 Section summary and shortcomings

Whereas the literature discussed in the previous three sections focuses on the institutional environment and the interaction of embedded actors with it, scholarly attention gradually shifted to the embedded actors themselves. Research on institutional entrepreneurship identifies the conditions and characteristics that permit such motivated actors to promote alternative institutional arrangements (DiMaggio, 1988; Maguire et al., 2004). Scholars note an actor’s structural position and access to capital as the key enabling conditions for institutional entrepreneurship. However, by focusing either on relatively unstructured fields or disadvantaged actors, the embeddedness of actors is often dismissed (Delbridge & Edwards, 2013; Hallett & Ventresca, 2006). Along the same lines, Willmott (2010, p. 71) refers to the “excessive voluntarism ascribed to institutional entrepreneurship studies”. A more recent stream of research focuses on the practical activities involved when actors create, disrupt or maintain institutions (Lawrence & Suddaby, 2006). This literature also portrays actors as relatively disembedded and their actions as overly intentional (Jarzabkowski, Smets, Bednarek, et al., 2013). A projective, future orientated conceptualisation of agency dominates accordingly both literatures (Emirbayer & Mische, 1998). Additionally, both conversations tend to focus on the actions of organisations as collective entities (Empson et al., 2013). Scholars consequently call to better account for the embeddedness of actors, to focus on the individual level, intra-organisational dynamics involved and to study the unintended

consequences that might arise from an actor's efforts to promote alternative institutional ideas.

Actor's embeddedness. Reconciling the embeddedness of actors and their potential to engage in non-confirmative actions, Seo and Creed's (2002) contradiction framework has recently attracted increased attention amongst institutionalists. Based on Friedland and Alford's (1991) fundamental notion of contradictory multiple logics that exist in any field, those scholars acknowledge that "while institutions constrain action they also provide sources of agency and change" (Thornton & Ocasio, 2008, p. 101). Lawrence et al. (2011, p. 55) maintain that "agency is neither just an effect of the actors' institutional embeddedness, nor isolated from this embeddedness." Institutional change emerges when human praxis exploits institutional tensions and contradictions: when individuals use contradictions to reflect on and critique the limits of present institutional arrangements and to inspire ideas for new ones; and when they mobilise and engage other actors in collective action to reconstruct the field (Hardy & Maguire, 2017, p. 267; Clemens & Cook, 1999; Seo & Creed, 2002).

A focus on actors within the organisation. A lack of attention to individuals has been noted in neo-institutional research in general (Greenwood et al., 2014; W. W. Powell & Colyvas, 2008a; Suddaby, 2010), institutional logics research (Zilber, 2016a, 2016b), institutional entrepreneurship (Battilana et al., 2009; Gomez & Bouty, 2011) and institutional work (Empson et al., 2013; Lawrence et al., 2013, 2011). For instance, Smets and colleagues (2012, p. 877) argue that documenting shifts in field-level organisations logics neglect "the micro level origins and earliest moments of institutional change, prompting calls to pay closer attention to the unfolding of change as it arises from the day-to-day actions of individuals." Building on this thought, scholars have recently located the origins of broader institutional change within hybrid organisations when multiple logics are integrated in structures, processes and practices (Greenwood & Suddaby, 2006; Schildt & Perkmann, 2016; Smets, Morris, & Greenwood, 2012). However, in mature organisation that are assumed to be guided by a dominant organisational logics, hybridisation presumably rests on the social action— institutional agency—of individuals as they challenge a prevailing logic and introduce and endorse an alternative one (Schildt & Perkmann, 2016). Taking the embeddedness of actors seriously, human praxis that mobilises collective action consequently entails "loosening the institutional embeddedness of those being mobilized" (Battilana et al., 2009, p. 78) in order to

weaken the “comprehensibility of their actions” (Lawrence & Suddaby, 2006, p. 234). In this context, Suddaby et al. (2016, p. 2) argue that “some individuals cognitively perceive the social world as contingent and thus amenable to change while others see it as concrete and immutable.” Institutionalists therefore call to account for actor’s social origins and trajectories (Suddaby et al., 2016) and their “capacity to reflect on this embeddedness [and to] develop conscious intentionality” (Lawrence et al., 2011, p. 55). However, although reflexivity is a central concept in Seo and Creed’s (2002) framework and in Lawrence and Suddaby’s (2006) notion of institutional work, it is rarely addressed empirically. Lawrence et al. (2013, p. 1029) maintain therefore that “rather than abandoning the notion of reflexivity, we suggest it can be a central issue for empirical analysis, focusing in particular on how such reflexivity is developed.” Attending to the micro level dynamics of institutional change furthermore necessitates not only analysing the “persuasive speech or rhetoric [that individual social actors employ] to shape the pace and direction of field-level institutional change” (Suddaby & Viale, 2011, p. 434). Recent contributions have highlighted the importance of practical work (Bjerregaard, 2011; Smets, Morris, & Greenwood, 2012), emotions (Voronov & Vince, 2012), artefacts (Monteiro & Nicolini, 2014; Raviola & Norbäck, 2013) and temporality (Granqvist & Gustafsson, 2015) in the context of institutional agency.

Unintended consequences of institutional agency. Empson et al. (2013, p. 809) note that scholarship that draws on the institutional work framework tends to portray “institutional workers as coherent entities acting consistently upon a single clearly identifiable institution.” Apart from the already discussed shortfall to portray actors, usually an organisation as a coherent entity, the focus on “a single clearly identifiable institution” reflects another shortfall in the existing literature. Because existing research draws mostly on retrospective accounts based on interviews or archival material, this “clearly identifiable institution” constitutes the ultimate starting point for their analysis (see Heinze & Weber, 2016; Jarzabkowski, Smets, & Bednarek, 2013; Smets, Morris, & Greenwood, 2012; Smets et al., 2015 for exceptions). Scholarship tends to foreground “the institutional change as the object of explanation” (Lawrence et al., 2011, p. 55) and to portray actors as “highly successful with respect to creating intended institutional effects” (Lawrence et al., 2009, p. 11). However, stability that emerges from dominant institutional logics (Thornton et al., 2012); resistance from “institutional defenders” (Levy & Scully, 2007, p. 984) privileged by the current institutional

arrangement; or intra-organisational conflicts that arise through the internal representation of conflicting logics (Pache & Santos, 2010), make such sanitised accounts somewhat problematic. If actors are “constantly doing things to build, sustain, and tear down institutions” (Dobbin, 2010, p. 673), purposeful action directed towards some intended institutional arrangement might be inconsequential, or result in outcomes that differ from those intended by the actors (Lawrence et al., 2013, 2009; Lawrence & Suddaby, 2006).

2.7. Chapter summary

This chapter has discussed four themes of neo-institutionalism, and highlighted their respective shortcomings. Under the label ‘neo-institutionalism’ initial scholarly interest lay on homogeneity and stability of organisational fields. Researchers argued that regulatory, normative and cultural-cognitive elements introduce “a prescriptive, evaluative, and obligatory dimension into social life” (Scott, 2005a, p. 410). Organisations and individuals are in turn merely portrayed as “passive recipients of elements and pressures from their institutional environments” (Suddaby, 2010, p. 15). More recent scholarship has evoked the notion of dominant institutional logics to explain similarities in structures, processes and practices in organisational fields (Thornton et al., 2012). In the early 1990s, a second stream of scholarship analysed changes of institutional arrangements (Oliver, 1992). Research in this area shows that disruptive events situated outside a field can deinstitutionalise taken-for-granted ways of organising, or trigger a shift in a field’s dominant logic.

Although researchers in both conversations draw on the notion of institutional logics as a method of analysis, a third stream of literature evokes Friedland and Alford’s (1991) meta-theory more fully (Thornton & Ocasio, 2008). Those researchers are interested in the contradictory practices and beliefs inherent in the major institutions, those of state, corporations, family, religion, markets and professions, of western societies. Whereas previous institutional literature assumes uniformity in the institutional environment, contradictions run across fields, requiring actors to make decisions regarding their conformity or non-conformity. Organisations and individuals embedded in contexts characterised by institutional complexity are labelled as hybrid actors; existing research studies the ways such actors reconcile and integrate competing institutional prescriptions. A fourth stream of literature focuses on actors and agency in processes of institutional change. Under the label

institutional entrepreneurship, earlier research sought to understand “when and why actors or ‘agents’ do not conform to social convention and, instead, challenge the institutional fabric by initiating nonisomorphic action” (George et al., 2006, p. 347). Scholarly attention has shifted more recently to these actions when actors create, maintain or disrupt institutions. Table 2.2 contrasts the four identified themes of institutional scholarship, and summarises their main shortcomings.

	Origins of institutional stability	Exogenous institutional change	Institutional complexity and hybrid actors	Actors and practices of institutional change	
				Actor focus	Activity focus
Main level of analysis	Field	Field	Organisation	Organisation	Organisation
Main questions	What explains similarities of structures, practices and behaviour in social fields?	What causes de-institutionalisation and shifts in dominant institutional logics?	How do actors cope with and manage competing institutional prescriptions?	What enables actors to create and change institutions	What are the practical activities involved?
Key insights	Isomorphism reflects conformity to institutional expectations in pursue of legitimacy	Exogenous shocks trigger changes in macro level social structures;	<i>Defensive responses:</i> Decoupling & compartmentalise <i>Strategic response:</i> Blended hybrid structures, practices and identities	Social position, field characteristics, resources and social skills; experienced contradictions create reflexivity and awareness	
Notion of social structure	Totalising pressures, dominant logics	Discontinuity or shift in logics; potential for exploitation	Contradictory societal logics enable agency and change	Reflects interest of embedded actors; emerging from ongoing negotiations in practice	
Embeddedness	High	High	Medium	Low	
Role of actors	Embody and enact institutions	Embody and enact shifts	Manage or cope with institutional complexity	Purposeful, heroic, unconstrained, unified;	
Main mode of agency	Habitual	Practical-evaluative	Practical-evaluative (situated)	Future oriented	
Shortcomings	Fails to account for change and interested actors	Fails to account for origins of change and to account the role of actors	Less attention to intra-organisation dynamics	Less attention on intra-organisation dynamics; focus on organisations and rhetorical strategies; reflexivity is under-theorised	
Key references	(DiMaggio & Powell, 1983, 1991; J. W. Meyer & Rowan, 1977; Scott, 1987; Thornton et al., 2005; Thornton & Ocasio, 1999; Zucker, 1977)	(Davis et al., 1994; Fligstein, 1991; Oliver, 1991, 1992; W. Powell, 1991)	(Battilana & Dorado, 2010; Friedland & Alford, 1991; J. W. Meyer & Rowan, 1977; Pache & Santos, 2010; Reay & Hinings, 2009; Smets et al., 2015)	(Greenwood & Suddaby, 2006; Hargrave & Van De Ven, 2006; Heinze & Weber, 2016; Lawrence & Suddaby, 2006; Lounsbury & Crumley, 2007; Schildt & Perkmann, 2016; Seo & Creed, 2002; Smets, Morris, & Greenwood, 2012)	

Table 2.2: Four themes of neo-institutional theory

To recap, the first two themes have primarily portrayed embedded actors as “prisoners of their institutional environments” (Suddaby, 2010, p. 15). A shift in dominant institutional logics was assumed to be revealed by embedded actors when they adopt structures, practices, identities, and so on. By contrast, in its focus on projective institutional agency, the last theme of scholarship has often under-theorised the embeddedness of actors. Seo and Creed’s (2002) framework somewhat reconciles the different themes of institutional scholarship that were introduced in this chapter. Like the literature discussed in sections 2.3 and 2.4, Seo and Creed (2002) acknowledge that one logic might hold a dominant position in a social domain. However, as to the literature discussed in section 2.5, actors are assumed to be enmeshed in a web of multiple logic that might be in conflict and “provide inconsistent expectations” (Greenwood et al., 2011, p. 321). The constant experience of contradictory institutional logics is proposed to lower the embeddedness of actors and to generate reflexivity (Seo & Creed, 2002). This in turn enables embedded actors to engage in some form of transformative institutional agency, as was discussed in sections 2.6.1 and Section 2.6.2.

Building on this framework, some scholars have analysed institutional change in mature fields, when central actors promote an alternative field-level logic (Greenwood & Suddaby, 2006). The micro level origins of such attempts, however, have received scant attention; before an organisation, as a collective entity, endorses an alternative logic that breaks with their field’s dominant one, something must happen within that organisation. Schildt and Perkmann (2016, p. 5) speak of the “processes of organisational hybridisation” that “can be a source of advantage for organizations that abandon existing field-level settlements and move early to embrace a previously unfamiliar institutional logic.” The next section discusses the introduced themes of institutional scholarship in the context of professional work in order to introduce the context of this study.

CHAPTER 3: The Institutionalised Nature of Professional Work

3.1. Aim of the chapter

The previous chapter concluded that existing literature has given little attention to individuals—within organisations—and their practical work when they challenge dominant institutional logics, and promote alternatives. Based on this broad research interest, this chapter seeks to elaborate why the “highly institutionalized” (Greenwood & Suddaby, 2006, p. 27) nature of professional work in general, and the issue of innovation in professional services in particular, provide an especially suitable context to study the dynamics involved. This chapter builds on the four themes of neo-institutional scholarship that were elaborated in the previous chapter. First, it focuses on persistence and stability in professional settings that emerge from isomorphic pressures and a dominant logic of professionalism. This chapter then discusses professional service innovation in the light of shifting institutional logics and hybrid organisations. Finally, the chapter turns to professionals and professional organisations as key actors facilitating shifts in the field’s dominant logic.

3.2. Professions and professional organisations

According to Empson (2008), professional organisations can be differentiated from others based on three characteristics: (1) their member’s individual and collective identity as professionals; (2) their unique resource base derived from the knowledge and expertise of professionals; and (3) their distinctive organisational form reflecting shared professional ideals. This section discusses these elements in the light of neo-institutional scholarship. First, sociological perspectives on professionalism are briefly outlined. This section then moves to the institutionalised nature of knowledge, structures and processes. According to Suddaby et al. (2009, p. 425, emphasis in original) these reflect “the logic of professionalism” in terms of “widespread understandings of how professionals *ought to act* [and] how professions *should be organized*”.

3.2.1 *Sociology of professions*

From a sociological perspective, two characteristics of professionalism are particularly relevant for this thesis: (1) Professionalisation as a process of institutionalisation in pursuit of

jurisdictional control and (2) professionalism as a dominant institutional logic (Freidson, 2001; Thornton et al., 2012).

Professionalisation as a process of institutionalisation. Sociologists have been interested in professions since the early twentieth century (Greenwood & Lachman, 1996). Earlier trait-based and functional approaches define professions and professionalism based on unique characteristics deemed to be functionally important by the society (Carr-Saunders & Wilson, 1964; Etzioni, 1969; Goode, 1972; T. H. Marshall, 1939; Parsons, 1939). More recent theories emphasise occupational closure and knowledge claims (Abbott, 1988; Freidson, 2001; Larson, 1977; Parkin, 1979; Witz, 1992). The concept of occupational closure builds on Weber's (1922/1978) sociology and his notion of closure as the "exclusion of outsiders from sharing" (p. 342). From this point of view, the key characteristic of professions is not superior skills that benefit the public; professionalisation rather denotes self-interested political action to secure high status and income (Macdonald, 1985). Professionalisation thus involves purposeful efforts of professional groups to establish "occupational monopolies" (Brock & Saks, 2016, p. 2) in order to "limit access to privileges and opportunities to a restricted number of eligibles" (Parkin, 1979, p. 44).

Professions establish occupational monopolies through "key institutional strategies such as certification, licensing, credentialing, and professional associations" (Suddaby & Muzio, 2015, p. 28). Licencing connotes the legally sanctioned permission to hold an occupational title (Weeden, 2002). While basically everybody is allowed to design a building, the title of 'architect' is, at least in some jurisdictions, protected by statute (Winch & Schneider, 1993). Credentialing refers to requirements for higher education that restrict the access to an occupational field (Freidson, 2001; Saks, 2012). Parkin (1979), for example, argues that professionalism is based on the restriction of access to resources and opportunities to a limited circle of credentialed individuals. In contrast to credentials that are awarded by formal educational bodies, certificates are issued by professional associations (Weeden, 2002). In occupations that have achieved a high degree of occupational closure, such certificates can even constitute a legal requirement to carry out certain tasks (Larson, 1977; Macdonald, 1985). In New Zealand, for example, financial statements must be audited according to paragraph 207 (1) of the Companies Act 1993 by a person who is certified by either the New Zealand Institute of Chartered Accountants (NZICA) or by another approved professional body.

Establishing an occupational monopoly, what the literature labels social closures, requires powerful professional bodies. These are (statutorily) sanctioned to define the qualifications necessary to perform a task, to certify and accredit members, to establish and monitor standards for professional conduct, and that have some kind of disciplinary control over members (Freidson, 2001; Leicht & Fennell, 2008; Macdonald, 1985; Suddaby & Muzio, 2015). Professional associations exert normative isomorphic institutional pressures through socialisation, and coercive pressures through regulation and sanctioning (Leicht & Fennell, 2008).

A more dynamic view on professions is provided by Abbott (1988, 1991) who emphasises the constant competition of occupational groups in their struggle for status, reputation and privileges (Saks, 2012, 2016). The defining characteristic of professions from this point of view is the “contest over jurisdiction and the attempt to monopolise expertise” (Suddaby & Muzio, 2015, p. 30). For Abbott (1988), jurisdiction refers to a profession’s privilege to have the exclusionary right to identify and to solve particular types of problems. It therefore reflects professional knowledge claims in competition with the knowledge claims of others (Freidson, 2001; Halpern, 1992). Yet, despite the “deeply institutionalized boundaries between occupations” (Grusky & Weeden, 2001, p. 208), Abbott’s (1988) view of professions as an open, ecological system points to the ongoing “boundary and domain disputes” (Leicht & Fennell, 2008, p. 433), “turf wars” (Saks, 2014, p. 86) or “jurisdictional battles” (Abbott, 2005, p. 256). According to Abbott (1991, p. 363), “professional knowledge enables the defense of a profession's jurisdiction and the potential seizure of others.” Since the core knowledge of a professional group is generally stable, however, competition between professions occurs mainly at the nexus of professional boundaries where expertise overlaps (Abbott, 1988, 1991). The expertise of accountants in tax law provides good examples for knowledge intersections with the legal profession (Rothman, 1984). Goode (1960, p. 902) refers to ‘encroachment’ when he describes a situation where a profession “claims the right to solve a problem which formerly was solved by another.” Along the same lines, Rothman (1984, p. 195) defines encroachment as an occupational group’s attempt “to enhance their own prerogatives and rewards by expanding into areas once reserved for existing professions.”

In the medical profession, for example, nurses and pharmacists struggle with doctors for influence over prescribing decisions (Eaton & Webb, 1979; Weiss & Sutton, 2009). Abbot

(1988) uses the architecture profession as illustrative of shifting jurisdictional boundaries. Whereas historically architects had full jurisdiction on building design and construction, architects even doing their own engineering, their role is nowadays limited to the design of the building. Over time, other professions, such as lawyers, engineers and even accountants, have encroached on the architect's (once exclusionary) knowledge domain. Likewise, lawyers ceded areas such as taxes and much corporate work to accountants during the course of the twentieth century (Kritzer, 1999; Rothman, 1984). In this context, Suddaby and Viale (2011, pp. 431–432) argue that efforts of professions to expand their knowledge bases and jurisdiction “reverberate throughout the social and organizational fields within which they are situated [and] produce key shifts in the boundaries and rule systems (‘logics’) of organizational fields.”

The professional logic. Attempts of professions and professional organisations to encroach on other jurisdictions have been linked to shifts in the institutional logic that traditionally guided professional work. The logic of professionalism denotes the norms, values and taken-for-granted assumptions of professionals (see Table 2.1). Von Nordenflycht, Morris and Malhotra (2015, p. 146) identify autonomy and the protection of public interest as the two “central professional norms”. Suddaby and colleagues (2009, p. 410) note that professionalism is an institutional logic “based on long-standing mythologies of independence and autonomy which, over time, has become a central discursive force in the field.” At the field-level, autonomy refers to a profession’s “authority and freedom to regulate themselves and act within their spheres of competence” (Wilensky, 1964, p. 146). At an individual level, autonomy reflects the professional’s desire to make their own judgement and to decide how and when a task is carried out (Freidson, 2001; Leicht, 2001; Mintzberg, 1983). Apart from autonomy, an alleged “trusteeship logic” (Gabbioneta, Prakash, & Greenwood, 2014) refers to the primacy of ethics, public and client interest over economic self-interest (Flood, 2011; Thornton & Ocasio, 2008). Existing scholarship has identified additional elements of the professional logic such as risk-adversity (Barratt & Hinings, 2015), individuals and organisational identities based on “the quality of craft” (Thornton et al., 2012, p. 56), or the “technical sophistication of advice to client” (Faulconbridge & Muzio, 2016, p. 16). Others add the professional’s high commitments to the profession (Suddaby et al., 2009), a strong sense of collectivity (W. W. Powell & Sandholtz, 2012; Thornton, 2002), an identity

characterised by collegiality and collaboration (Townley, 1997), or strong boundaries between professionals and the client as lay persons (Greenwood & Lachman, 1996). This portrayal of professionals as being guided by belief systems that sit “above petty commercial interests” (Suddaby et al., 2009, p. 414) is, unsurprisingly, often framed as incompatible with corporate and market logics that emphasise profit maximisation (Thornton, 2002), standardisation and routinisation of tasks (Thornton et al., 2012), or hierarchical control (Goodrick & Reay, 2011). Similarly, Freidson (2001) identifies professionalism as a “Third Logic” of organising and as an alternative to free markets (where work is controlled by consumers) and bureaucracy (where work is controlled by managers).

The notion of professions as occupational fields where social practices enact a dominant institutional logic relates to Bourdieu’s notion of habitus. Indeed, Bourdieu (1977) refers to the professional habitus as a more specialised type (secondary) habitus that is formed through university education, professional training and socialisation (Malsch & Gendron, 2013). For instance, Bourdieu (1986, p. 807) defines the professional habitus in the legal field as practices that “are strongly patterned by tradition, education, and the daily experience of legal custom and professional usage”. In their portrayal of professionalism as a form of symbolic capital, Schinkel and Noordegraaf (2011, p. 86) refer to the professional habitus as the “predispositions that simultaneously reproduce and manipulate the borders of an occupation”. However, the notion of professional habitus is infrequently evoked in organisational sociology and organisational studies. An exception is Cook, Faulconbridge and Muzio’s (2012) study of recruitment practices in London City law firms. They find that a professional’s “appropriate habitus” in terms of behaviour, language or appearance provides them with a “competitive advantage by signalling conformity with the values, assumptions, and expectations (doxa) of a particular field” (p. 1748). A habitus that is consistent with the fields therefore facilitates the reproduction of an elite culture characteristic of large law firms (A. Cook et al., 2012). More recently, Spence and Carter (2014) studied the professional habitus in large accounting firms. They distinguish between a technical-professional and a commercial-professional habitus (notably their study relies solely on data from semi-structured interviews). The former refers to the embodiment of a ‘technical-professional logics’ that is reflected in traditional rhetoric around serving public interest, integrity and ethics. In contrast, Spence and Carter (2014) argue that professionals who achieved

partnership status embody a 'commercial-professional logic' in their rhetoric of revenue generation, business development, cross-selling services or commercial savviness.

3.2.2 Professional knowledge

For Larson (1977, p. xvii) professionalisation is "an attempt to translate one order of scarce resources—special knowledge and skills—into another—social and economic rewards." A formal body of abstract expertise enables professions to establish boundaries to associated professions and to defend their jurisdiction (Abbott, 1991; Larson, 1977; Suddaby & Muzio, 2015). In this thesis, two notions on professional knowledge are particularly relevant: knowledge as an institutionalised base of expertise, and knowledge as the institutionalised practices that reflect the shared understanding of a field.

A profession's knowledge base underpins jurisdictional claims (Abbott, 1988; Freidson, 2001) and constitutes "a strategic resource of social power and control" (Blackler, Reed, & Whitaker, 1993, p. 851). Empson (2001a, p. 859) refers to a profession's "externally legitimized sectoral knowledge base" that is shared by all professionals in a field. Sectoral knowledge is institutionalised through the codification in the syllabus of professional exams and through compulsory academic education (Mahnke, Laursen, & Vejrup-Hansen, 2012; Morris & Empson, 1998). By setting entry and training requirements, professional associations control this knowledge base and determine the appropriate and relevant knowledge for a particular occupational group (Barratt & Hinings, 2015; Faulconbridge & Muzio, 2007; Leicht & Fennell, 2008; Saks, 2012). In this regard, Halliday (1985) distinguishes between three bodies of knowledge that underpin different professional fields: (1) normative (based on codified rules); (2) technical (based on scientist research and natural laws); or (3) syncretic (an amalgam of both normative and technical knowledge) knowledge bases. Lawyers, for example, draw primarily on normative knowledge derived from codified norms and rules, whereas engineers are constrained to a larger extent by the universal laws of physics (Halliday, 1985; Malhotra & Morris, 2009). A profession's confined sectoral knowledge base contributes to stability in professional fields when "particular forms of knowledge are regarded as more appropriate, more relevant, and more 'professional'" (Seabrooke, 2014, p. 52). At the organisational level, Zietsma and colleagues (2002, p. 61) introduce the concept of a 'legitimacy trap' to describe an organisation's over-reliance on "institutionalized knowledge when external challenges arise."

Conversely, change and innovation in professional fields is often related to diversity of expertise and overlapping knowledge claims (Abbott, 1988; Francis & Sommerlad, 2009; Malhotra & Morris, 2009). Randall and Kindiak (2008, p. 346) argue that professions with an “educational curriculum that promotes a broad base of competencies [...] provides individual practitioners with the knowledge, skills, and abilities to seize opportunities beyond their traditional scopes of practice.” On a meso level, Mahnke, Laursen and Vejrup-Hansen (2012, p. 148) study an engineering consulting firms and suggest that “having different bodies of knowledge inside the firm allows for entrepreneurial knowledge (re)combination in the pursuit of service innovation.”

The notion of an institutionalised professional knowledge base is underpinned, however, by an overly explicit and individualistic conceptualisation of knowledge (see S. Cook & Brown, 1999). In contrast, Barratt and Hinings (2015, p. 240) emphasise that in “professionally-based organizations knowledge is highly practice-based”. Cook and Brown (1999, p. 387) argue along the same lines when they state that “to be accomplished in a profession, discipline, or craft, [...] is necessarily tied up with practicing it”. Thus, professional knowledge “lives through its agents” (Seabrooke, 2014, p. 52), accomplished in social interactions that comply with the logic of the situation (Gherardi, 2009). For instance, Styhre (2011, p. 266) argues that jurisdiction of architects is based not so much on professional education but on the social practice of “seeing as an architect” that is acquired from practical work and ongoing discussions with peers. Gherardi (2008, p. 518) refers to “practice as institutionalized knowledge” that is meaningful to actors in their social context and incorporated in professional identities. Differences between professional groups, therefore, do not simply denote distinct knowledge bases. They also reflect the ways those are enacted in practice and embodied in professional identities (Knorr-Cetina, 1999; Robertson, Scarbrough, & Swan, 2003).

3.2.3 Professionals in organisational context

The presumed incompatibility of commercial-market and professional logics inspired a large body of literature in sociology and organisational studies. Raelin (1991) notes a ‘clash of cultures’ that emerges from the tension between professional values and bureaucratic principles. Grounded in a trait-based view of professionalism, scholars argued that

employment in large (bureaucratic) organisations would inevitably subordinate professional ideals to organizational values such as efficiency and authority (Goode, 1957; Suddaby & Viale, 2011). Once professionals increasingly organised themselves in large professional organisations, however, scholars began to explore how the presumed incompatible value spheres were reconciled within such firms. Sociologists (e.g., Hall, 1968; Montagna, 1968; Scott, 1965) initially compared professional organisations with corporate bureaucracies, identifying distinguishing features such as collegial decision making, governance by professionals, greater autonomy, and coordination through a strong clan culture (Ouchi, 1980). Stinchcombe (1959) differentiates mass production from craft- and professional-based organisations where workers enjoy a considerable amount of discretionary decision making based on professional training and certification. Mintzberg (1979, 1980, 1983) identified the 'professional bureaucracy' as an ideal-typical organisational configuration that contained both professional ideals and bureaucratic structures. Highly skilled professionals worked in relative independence without formalised work processes. Control and coordination relied on standardised skills and internalised values that "pre-determine what is to be done" (Mintzberg, 1979, p. 351). In the early 1990s, a distinct body of literature emerged based on those earlier intellectual foundations but with a "more dynamic and managerial flavour" (Morris, 2008, p. 151). Also, whereas earlier studies often focused on non-profit, governmental professional organisations such as public hospitals, this stream of literature was primarily interested in commercial professional service firms (PSFs) such as accounting and law firms (von Nordenflycht, 2010). Drawing on neo-institutional theory, researchers identify ideal-typical 'organisational archetypes' in the professional field that converge isomorphically around a prevailing interpretive scheme (Greenwood et al., 1990; Greenwood & Hinings, 1993). Greenwood and Hinings (1988, p. 295 emphasis in original) define a field's interpretive scheme as the

beliefs and values about three principal and constraining vectors of activity:
(1) the appropriate *domain* of operations i.e. the broad nature of an organization's *raison d'être*; (2) beliefs and values about appropriate *principles* of organizing; and (3) appropriate *criteria* that should be used for evaluating organizational performance.

The shared interpretive scheme is embodied in archetypical structures and processes of professional organisations and enacted by professionals in their daily work (Brock, 2006). The conceptualisation of interpretive scheme and organisational archetypes is very similar to the notion of dominant institutional logics (see section 2.3.3). While organisational archetypes refer to the material aspects of the professional logic, the interpretive scheme denotes the symbolic elements those configurations embody (Barratt & Hinings, 2015).

Greenwood and colleagues (1990) identify the professional partnership (or P²-form) as the traditional professional archetype that embodies the “ideas, beliefs and values” (Greenwood & Hinings, 1988, p. 295) of a dominant professional logic. One distinguishing feature of the archetype is the fusion of ownership and control as professionals, typically from one single occupational group, govern the firm, manage it and deliver the professional services (Brock, 2006). Not having commercially-driven non-professionals such as shareholders involved in governance and ownership reflected the traditional professional values of trusteeship and independence that might be compromised by external pressures for commercial gains (Greenwood et al., 1990; von Nordenflycht, 2010). Practices and processes such as peer evaluation, consensus based governance and minimal formalisation, standardisation and supervision reconciled professional values with organisational employment (Brock et al., 2007; Greenwood et al., 1990; R. Hinings, Brown, & Greenwood, 1991). Management typically constitutes a “part-time responsibility” (Morris, 2008, p. 151) of partners who are still involved in the day-to-day delivery of professional services. The P²-form was said to be the ideal form of governance to motivate and manage professionals who have a strong bargaining position due to their skills and expertise (Empson & Chapman, 2006; Løwendahl, 2005; von Nordenflycht, 2010). Another distinguishing feature of P² archetype is its differentiation into several functional practice areas (sub-units) that reflect the individual interests, skills and expertise of the respective partner (Anand et al., 2007; Greenwood et al., 1990). A large law firm, for example, might have one practice area that is specialised in environmental law, another focused on finance law and so on.

Although references to the long-established literature on professional archetypes are often absent, the distinctiveness of organisational forms in the professional fields is also recognised by scholars who draw on the institutional logics perspective. Thornton (2002, p. 83) emphasises the inherent conflicts between market and professional logics that “implying

countervailing determinants of organization structure” without citing any of the literature outlined above. As with broader neo-institutional literature, research on professional organisation has shifted attention gradually from stability in professional fields to innovation and (institutional) change.

3.3. Innovation in professional services

This section outlines the drivers for innovation in the professional service sector and shows how PSFs have responded through both organisational and service innovation. This is done to set the scene for the remainder of this chapter that discusses the contested nature of professional service innovation when challenging the field’s dominant professional logic.

3.3.1 *Drivers for innovation*

Corresponding to the exogenous forces of institutional change that were discussed in section 2.4, two main catalysts for innovation in the professional service sector can be distinguished: (1) increased market pressures that result from the commodification of knowledge, deregulation of professional services and globalisation, and (2) the emergence or shift of client demands (Malhotra, Morris, & Hinings, 2006; M. J. Powell, Brock, & Hinings, 1999).

First, the claim to be knowledge intensive is perhaps the most distinguishing feature of PSFs (Alvesson, 2001; von Nordenflycht, 2010). For PSFs, knowledge is both an input and an output factor (Starbuck, 1992) implying that the ability to create and sustain knowledge is particularly important (Reihlen & Werr, 2012). Expert knowledge, however, commodifies in the course of time to a routinised and codified product (Empson, 2001b; Morris, 2008), making it less complex, more transparent and more imitable (Suddaby & Greenwood, 2001). The commodification of knowledge is linked regularly with developments in technology. The availability of blood pressure and pregnancy tests in retail stores has enabled non-professionals to carry out tasks that were once located in the exclusionary knowledge domain of doctors (Brock, 2006). Significant changes in the accounting industry emerged when the audit process became commodified (Cooper, Hinings, Greenwood, & Brown, 1996; Greenwood, Li, Prakash, & Deephouse, 2005; Maister, 2003). Once the nature and quality of services became indistinguishable, the price for professional services turned into the main decision factor for clients. For that reason, competition amongst audit firms is based mostly on an ex-ante agreed fixed fee of professional audits (Macey & Sale, 2003; Malhotra & Morris,

2009). Advances in computer technology have made it possible for laymen to utilise online templates to draw up contracts or wills without having to rely on law firms (Brock, 2006; Fournier, 2000). Advancements in artificial intelligence have the potential to amplify the commodification of professional knowledge. Practitioners argue that a legal module developed for IBM Watson (an artificial intelligent computer system) could “replace junior associates [in law firms] or at least perform much of their work” (Friedmann, 2014, para. 3; see also Susskind, 2008). Attempts to deregulate professional services have reduced statutory privileges and fuelled intra- and inter-professional competition (M. J. Powell et al., 1999). The general trend towards globalisation has amplified market pressures as international firms increasingly compete with domestic ones (Brock et al., 2007).

The second driver for innovation in professional services is linked closely to commodification of knowledge and globalisation. These necessitate PSFs to either deliver existing services more efficiently and effectively, or to establish new ones in order to tackle novel problems (Malhotra, Smets, & Morris, 2016; Reihlen & Werr, 2015). Scholars argue that clients have become less committed to long-term relationships with their suppliers, this intensifying competition among professional service firms (Broschak, 2015). However, clients also have a more generative role in professional service innovation. For instance, PSF internationalisation (especially of accounting and audit firms) was often inspired by the internationalisation of clients (Greenwood & Lachman, 1996). By expanding into the same geographical jurisdictions as their clients, PSFs were able to provide seamless global services (Kaiser & Ringlstetter, 2011). Much of the literature on professional service innovation has highlighted the central role of the client as a co-creator of innovation in PSFs “through the problems they pose [and] through the insights they share” (Morris, Smets, & Greenwood, 2015, p. 305). New ideas in PSFs often emerge in interactions with clients, prompted by the challenges and complex problems experienced (Fosstenlökken, Løwendahl, & Revang, 2003; Heusinkveld & Benders, 2005). For example, insights into shortcomings of their client’s systems and processes gained through the provision of auditing services made accounting firms aware of management consulting opportunities (Morris & Empson, 1998). Both of the mentioned drivers necessitate that PSFs offer new, more profitable services to their clients or existing services to new clients.

3.3.2 Innovation as service diversification

Referring to the commoditisation of knowledge, Larson (1977, p. 31) notes that “where everyone can claim to be an expert, there is no expertise”. Over-reliance on a single, high-profile service might thus prove to be problematic in the long run for PSFs (Kipping, 1999). Through the expansion of existing, and the creation of new ‘knowledge products’, PSFs have responded to decreasing margins from existing services but also to emerging client demands for new ones (Hitt, Bierman, Shimizu, & Kochhar, 2001; Suddaby & Greenwood, 2001). The framework in Table 3.1 illustrates four diversification strategies PSFs can pursue to explore and exploit opportunities for new services and markets (Muzio & Flood, 2012).

		Locus of diversification	
		Inside field	Outside field
Potential for institutional conflicts	Low	Incremental recombination	Uncontested spaces
	High	Internationalisation	Encroachment

Table 3.1: Four diversification strategies for PSFs

On the horizontal axis, the framework distinguishes between the locus of diversification that can be either within a given field or outside its traditional boundaries. The vertical axis differentiates between the potential of institutional conflicts that PSFs encounter when diversifying their service repertoire.

Incremental recombination refers to new service offerings that differ only “incrementally from a professional firm's domain of activity” (Gardner et al., 2008, p. 1102). These new services are based on “a pure recombination of existing knowledge” (Gardner et al., 2008, p. 1116) and are linked closely with the existing knowledge base of a profession. Services are delivered mainly by professionals with the same occupational background who can draw on established practices and processes (see Gardner et al., 2008). Such services typically rely on a shared understanding amongst stakeholders of the value they add (cognitive legitimacy) and demonstrate commercial viability (pragmatic legitimacy). Gardner

et al. (2008) state project finance and corporate debt services as examples for (incremental) new practice areas in law firms. Similar to incremental recombination, internationalisation of professional services is based on existing knowledge that is leveraged in other jurisdictions. Regulative institutional pressures might, however, limit the opportunities for geographical diversification. Malhotra and Morris (2009, p. 911) refer to “geographic jurisdictional barriers” that reflect differences in the licencing, certification, and qualification requirements of different geographical jurisdictions (Brock, Powell, & Hinings, 1999). In many jurisdictions, only lawyers qualified in a particular country are legally allowed to practice their profession. Foreign firms are effectively barred from operating in that jurisdiction (Malhotra & Morris, 2009). Internationalisation of PSFs is for that reason based often on cross-border investments, mergers and acquisitions or the establishment of international networks (Aharoni, 2000b).

Some PSFs have diversified more radically into areas of work that sit outside their established jurisdiction. In this context, Suddaby et al. (2009, p. 410) refer to PSFs who offer “non-traditional work” such as accounting firms who added management consulting services to their service repertoire. Suddaby and Greenwood (2001, p. 935) coin the term “knowledge colonization” when PSFs respond to the commodification of knowledge by expanding the scale and scope of their service areas into “new knowledge territories”. Some attempts to diversify services outside a profession’s traditional area of expertise might be directed at relatively “uncontested space” (Suddaby & Viale, 2011, p. 423). In those, no occupational groups have established strong jurisdictional claims for a particular type of work. For instance, accounting and auditing firms added services such as strategic, forensic and environmental audits to their service repertoire (Malhotra et al., 2006). Power (1997) shows through the example of environmental audits that those attempts necessitated the recruitment of non-accounting personell such as applied biologists or engineers. However, the accountants subordinated the practices and knowledge of non-accounting experts and used the ‘narrow’ specialists merely for particular ‘technical’ problems (Power, 1997, p. 140).

What has been labelled as ‘encroachment’ in Table 3.1. refers to the inherent conflict in professional service diversification in attempts of “colonizing existing space occupied by adjacent professions” (Suddaby & Viale, 2011, p. 429). Aharoni (2000b, p. 18) argues in this context that “one major development in all professional business service firms is that the increasing competition caused all of them to cross boundaries and invade each other's

territories." In sociological literature discussed in section 3.2.1, encroachment refers primarily to the field level competition between professions. Literature that draws on an institutional entrepreneurship and institutional work lens has focused on the organisational level and identified PSFs as the main actors in the process. Suddaby et al. (2007, p. 336) refer to the "encroachment of large accounting firms on the professional jurisdiction of law". Existing research shows that such firms increasingly adopt multi-disciplinary practices (MDPs) where professionals from different occupational groups form 'one-stop-shops' for "an extensive array of services, including financial advisory, management consulting, and legal services" (Greenwood et al., 2002, p. 58). However, recruitment of professionals with non-traditional backgrounds exposed the firms more permanently to alternative logics, triggering inter-professional conflicts (Gendron & Barrett, 2004; Power, 1997). As discussed further in section 3.4., the largest accounting firms (the Big Four), in conjunction with accounting bodies, have embraced multi-disciplinary organisation. Other professions have opposed MDPs on ethical grounds (Paton, 2009). Malhotra et al. (2006, p. 184) note that "although law firms have diversified, they have generally chosen to avoid doing so outside the domain of legal services" and rejected having non-lawyer ownership "as inconsistent with the core values of the legal profession" (Paton, 2009, p. 2193). With regulative barriers eroding in several jurisdictions, academics and practitioners note a re-emergence of multi-disciplinary practices in professions such as law and accounting (McDougald & Greenwood, 2012; Robinson, 2016).

3.3.3 Innovation as organisational change

Apart from diversifying their service repertoire, PSFs have responded to increased market pressures by adopting more 'corporate style' structures and processes. Cooper et al. (1996) identified the managed professional business (MPB) to distinguish a more "business-like" professional archetype from the traditional professional partnership (the P²-form). Underpinned by an increased emphasis on efficiency and cost-effectiveness, this archetype is characterised by centralised strategic control, higher levels of differentiation and specialisation, bureaucracy and formalisation (Brock et al., 1999). Processes and functions such as performance-appraisal systems and chief executive positions were adopted from non-professional organisations (Brock et al., 1999). Although the technical skills of professionals remained important, they were increasingly taken for granted and regarded as insufficient to deliver services that add value to a client's business (Cooper et al., 1996). This does not indicate

a distinct shift from one archetype to another and the abandonment of traditional professional values. To the contrary, Cooper and colleagues (1996, p. 624) use the geological metaphor of sedimentation to emphasise the “persistence of values, ideas and practices, even when the formal structures and processes seem to change.” Thus, a commitment to autonomy, collegiality and independence still characterise how those firms operate and organise (Faulconbridge & Muzio, 2008).

Brock, Powell and Hinings (2007, pp. 236–237) note that although “the MPB clearly represents the progression along the path of managerialism and business-like interpretive schemes”, the global, multi-disciplinary PSFs constitute a “more radical archetype” whose “interpretive scheme emphasizes generating wealth and market dominance”. Most scholarly insights in this context are based on the large accounting firms “who have diversified away from their core audit function” (Malhotra et al., 2006, p. 184) and integrated financial advisory, management consulting, and legal services into their service range (Morris, Gardner, & Anand, 2012; Suddaby & Greenwood, 2001). Suddaby and Greenwood (2001, p. 946) note that those PSFs “have transformed themselves from accounting firms to consulting firms and, ultimately, to multi-disciplinary business service providers.” By adopting a “one-stop-shop business model” (Armbrüster, 2006b, p. 133) for professional services that offered integrated solutions across occupational and geographic boundaries, and adopting identities, practices, processes and structures that embraced business-like values, those firms increasingly undermined the collectively shared beliefs of the accounting profession (Faulconbridge & Muzio, 2014; Suddaby et al., 2009).

While the MBP form still reflects core elements of the dominant professional logic, multi-disciplinary practices (MDPs) are often portrayed as an all-encompassing embodiment of the corporate-market logic. Greenwood and Suddaby (2006, p. 35) argue that the MDP form “blatantly challenged the prevailing institutional logic” in its emphasis on cross-selling of a diversified range of services, a diverse (multi-profession) workforce, formalised marketing, commercial acumen of professionals and its underlying values of professional services as a business. Also clients gradually became more involved in and established control over the process of service delivery. Greenwood and Lachmann (1996, p. 566) argue that “the role of clients as co-producers of a professional service is new, and changes their traditional ‘passive’ role as recipients of professional services.”

Attempts of PSFs to encroach into the knowledge territories of other professions in attempts to offer one-stop-shop services to their clients are relevant for this thesis in several ways. First, those endeavours are frequently linked to shifts in dominant institutional logics on the field level. Suddaby and Viale (2011, p. 429) note that the accounting profession's "rapid encroachment into the jurisdictions of related professions", and the emergence of multi-disciplinary practices, produced "profound changes in the institutional landscape". Secondly, multi-disciplinary practices (MDPs) are often labelled hybrid organisations (see section 2.5) subjected to the demands of conflicting institutional logics (Pache & Santos, 2010).

3.4. Professional service innovation and institutional change

The portrayal of professional fields as being highly institutionalised indicates a high degree of persistence and stability. Innovation in those settings is usually portrayed as an incremental phenomenon "caged within professional boundaries" (Reihlen & Werr, 2012, p. 6). Nevertheless, contextual changes, professional service diversification and the emergence of new organisational archetypes are often related to changes in the underpinning logics of some professional fields (Barratt & Hinings, 2015). In line with the broader literature on institutional change and complexity, three perspectives on professional service innovation and the related institutional dynamics warrant further discussion. One set of publications focuses on a presumed field-level shift from a dominant professional to a commercially oriented logic. Two additional sets of literature draw on notions of institutional complexity, focusing on the intra-organisational representations of those logics. These scholars argue that the diversification into adjacent areas of expertise has turned contemporary PSFs into "hybrid professional organizations, providing 'one-stop shops' for business or professional services" (M. J. Powell et al., 1999, p. 9). The underpinning notion of hybridity differs, however, in existing accounts. Some portray PSFs as blended hybrids that manage to integrate diverse logics in their processes, structures, practices and identity. Other scholars refer to the inherent intra-organisational conflict between logics and the failure to reconcile them, that lead to prominent corporate scandals and organisational failures (Greenwood et al., 2011).

3.4.1 *Shifting logics in professional fields*

A large set of literature has argued that the dominant logic of professional fields has shifted from a professional to a commercial-market oriented logic. Fournier (2000, p. 68) speaks of

“the colonisation of the public interest by the creeping logic of commercialism and the market”. Along the same lines, Suddaby et al. (2007, p. 335) note that the “dominant institutional logic has moved from one based on professional trusteeship to one based on a commercial exchange of expertise.” The transition from the professional partnership (P²) to the MBP and the MDP archetype is also framed by some scholars as a shift in institutional logics. For example, Barrat and Hinings (2015, p. 242) speak of the “professional logic underlying one organizational form (P²) and the more corporate logic of the Managed Professional Business”. Some authors relate this shift in logics to exogenous events and broader societal transformations (see Greenwood et al., 2014, p. 1215; Leicht & Lyman, 2006). Thornton and colleagues (2012) argue that

contextual changes led to a change in organizational-level logics: from a traditional professional logic based on a provision of a narrow range of services and limited management positions to a more market–corporate logic with cross-selling of a diversified range of services and specialized, full-time management position. (p. 100)

Other scholars, however, explicitly acknowledge the crucial role of PSFs as facilitators of an emerging commercially oriented logic in some professional fields. PSFs have not merely reacted to exogenous pressures but more actively and purposefully created opportunities in pursuit of economic benefits. Professional fields (as a plural) points to the conceptualisation of multiple fields where this alleged shift is more or less pronounced. For instance, Greenwood et al. (2006, p. 10) argue that “firms in some professions, notably accounting, have succumbed more clearly to commercial logics, while others, such as law, have retained their attachment to the logic of professionalism.” The literature on shifting logics in professional contexts is therefore often grounded in insights from the accounting field where the “big firms acted entrepreneurially and triggered a process of deinstitutionalization” (Malhotra et al., 2006, p. 192). The adoption of multi-disciplinary organisational forms and diversification into non-traditional services undermined the field’s dominant (professional logic) in several ways.

Based on the assumed conflict between professional and commercial-market logics, Greenwood and Suddaby (2006, p. 35) argue that the large accounting firm’s foray into multidisciplinary service offerings challenged the dominant professional logic “which

prescribed that professional services be provided by firms dominated by one profession". The pressure to cross-sell services and no longer personally serve all the needs of clients also challenged traditional ideas of professionalism that stress individual, gentlemanly services (Cooper et al., 1996). Likewise, service innovation in terms of diversifying into adjacent areas of expertise (in particular management consulting) is believed to have undermined traditional professional logic and introduced an alternative logic to the field (B. Hinings, Greenwood, & Cooper, 1999). Leicht and Lyman (2006, p. 32) contend that "the independence and integrity of accounting is being undermined by the provision of other business services, especially management consulting."

Existing literature essentially portrays management consulting as the ultimate incarnation of a market-corporate logic. Greenwood and colleagues (2006, p. 8) refer to management consulting as a profession "where traditional values of ethics and public service are viewed as archaic and quaint constraints on unfettered and efficient capital markets." Leicht and Lyman (2006, p. 35) claim that "the logic of markets as an organizing principle for a would-be profession is most evident in the current popularity of management consulting." Referring to micro level actors, Gabbioneta et al. (2014, p. 23) label management consultants as "representatives of the commercial logic". This is echoed by McDougald and Greenwood (2012, p. 107) who discuss the differences between accounting and management consulting, concluding that the latter "is a different kind of business" and that management consultants are "more entrepreneurial, more egotistical, and faster moving". While this literature focuses on the field level shifts in logics, others draw on the notion of institutional complexity introduced in section 2.5. They portray contemporary PSFs as hybrid organisations who experience, cope with and respond to seemingly incompatible institutional expectations. In the context of PSFs, Greenwood et al. (2011) argue that

accounting firms are subject to the logic of professional service and, at the same time, the logic of commerce, which, under certain circumstances might prescribe different actions; [these firms] bring together different profession [...] each socialized within different cognitive and normative orders. (p. 318)

Drawing on the differentiation between blended and structured hybrids introduced in sections 2.5.1 and 2.5.2, some scholars portray PSFs as blended hybrids that managed to

reconcile the professional and the market-corporate logics. Others point to the intra-organisational conflicts and the ultimate abandonment of professional ideals that emerged from the compartmentalisation of competing logics.

3.4.2 Professional organisations as blended hybrids

Scholarship that draws on notion of sedimented professional organisations (Cooper et al., 1996) conceptualises contemporary PSFs as blended hybrid organisations that “combine and layer ‘practices’ taken from different logics into a single organization” (Greenwood et al., 2011, p. 352). Similarly, Brock and colleagues (2007, p. 242) refer to both, the MPB but also the MDP archetype, as a “hybrid archetype” that “still rests on traditional professional values of collegiality, consensus, quality of service, and technical autonomy in serving clients.” Corresponding to the literature on organisations and individuals in hybrid contexts discussed in section 2.5, scholars explore the internal representation of multiple logics on several levels (see Noordegraaf, 2015).

At an organisational level, blended hybridity refers to the combination of supposedly contradictory principles that result in “hybrid organizational structures and cultures, combining traditional public service values with their new business management tools and systems” (Brock et al., 2007, p. 231). Noordegraaf (2015, p. 187) speaks of “hybrid professional practices” that incorporate elements of an alternative logics while maintaining core elements of the dominant one. Research has shown that public service organisations adopt management tools and systems in order to preserve traditional public service values (Brock et al., 2007; Ferlie, 1996). Healthcare organisations incorporated practices from more market-corporate logics in order to treat patients more efficiently and effectively (Kirkpatrick & Noordegraaf, 2015). Smets et al. (2012) observed the emergence of hybrid legal practices where English lawyers and German Rechtsanwälte worked together on transnational cases; the assumption underpinning this notion of organisational hybridity is essentially that increasingly complex and global problems necessitate organisations that are able to manage and to integrate a diverse set of logics (Kirkpatrick & Noordegraaf, 2015; Noordegraaf, 2011). Smets and colleagues (2015, p. 967) refer to such organisations as “blended hybrids with a single ambidextrous culture” that facilitate cooperation in order to deliver better professional services. The notion of blended hybrids reflects their alleged ability to better solve multi-

faceted problems that require “inter-professional teams” (Nancarrow & Borthwick, 2005, p. 898) and “multi-disciplinary ways of working” (Noordegraaf, 2011, p. 1360).

As discussed more broadly in section 2.5, the notion of blended hybridity points to individual actors who can construct problems and solutions that align with the different logics at play (Blomgren & Waks, 2015; Pache & Santos, 2010). Scholars speak of hybrid professionals who are “likely to be influential in organizations characterized by institutional complexity” (Noordegraaf, 2015, p. 194). In this literature, hybrid professionalism rests on the blending of professional identities (Blomgren & Waks, 2015) and knowledge (Kirkpatrick & Noordegraaf, 2015). In health care, Spyridonidis and colleagues (2015) speak of “hybrid physicians” who take up managerial responsibilities and incorporate competing logics into a new identity. In accounting, Bévort and Suddaby (2015) demonstrate that professionals-as-managers integrate both managerialism and professionalism into a coherent sense of self as their firm adopted a more corporate form of organizing. Current research has linked the emergence of hybrid professionals to multi-disciplinary knowledge and skills (Pache & Santos, 2013b). For instance, Noordegraaf (2015, p. 194) maintains that hybrid professionals “have developed a certain competence outside their main area of expertise and therefore are likely to have the capacity to bridge divergent logics”. Hybridisation is therefore often related to the acquisition of new skills that broaden the knowledge base of professionals (Kirkpatrick & Noordegraaf, 2015). Along the same line, Seabrooke (2014, p. 59) argues that the emergence of multi-disciplinary PSFs necessitates professionals who are “successful in playing off pools of knowledge from different ecologies”.

3.4.3 Professional organisations as structural hybrids

The notion of multi-disciplinary PSFs as blended hybrids is underpinned by a rather positive notion of hybridity and stability based on the persistence of traditional professional values. Other scholars draw on the notions of decoupling and compartmentalisation that were discussed in section 2.5.1. For instance, decoupling is visible in existing scholarship exploring the introduction of business-like health care that challenged the medical professional logic. Here, scholars observe that medical professionals “were able to deploy an appearance of complying with the managerial logic” (Skelcher & Smith, 2015, p. 444) while preserving their professional identities and independence (Reay & Hinings, 2009). Compartmentalisation

refers to the portrayal of multi-disciplinary PSFs as structural hybrids where conflicting or competing logics are organisationally separated in distinct practice areas. Existing scholarship highlights the conflict that arises through the “presence of multidisciplinary professional specializations” (Malhotra & Morris, 2009, p. 909) in those firms. Apart from “within-firm jurisdictional disputes” (Gardner et al., 2008, p. 1103) between professional groups, this conflict also relates to the embodiment and enactment of competing institutional logic. In their widely cited paper on organisational responses to conflicted institutional demands, Pache and Santos (2010) contend that change in organisational templates, or an absence thereof, relies on the internal representation of different logics and the power of internal groups adherent to them. They state explicitly that such situations emerge

when two different professions coexist and fight for dominance within an organization. This is the case in multidisciplinary partnerships, where consultants and auditors or lawyers and accountants hold different values and different views about the appropriate way to organize work. (p. 465)

Other scholars also recognise the emergence of intra-organisational conflicts “when accounting firms incorporated management consultants into their organizations which brought professional and market logics head to head” (Thornton & Ocasio, 2008, p. 116). Drawing on Bourdieusian sociology, Malsch and Gendron (2013) speak of the struggle within those PSFs that “involves an opposition in practice between the habitus of experts recruited to expand the range of services and the traditional dispositions of auditors” (p. 872). While the literature acknowledges the “tensions” (Malsch & Gendron, 2013, p. 884; McDougald & Greenwood, 2012, p. 104) or “fault lines” (B. Hinings et al., 1999, p. 145) that emerged through professional service diversification and the introduction of alternative institutional logics, little is known how PSFs manage and balance them in order to achieve stability (Greenwood et al., 2011; see Smets et al., 2015).

Existing literature, in contrast, emphasises the adverse effects that emerge when competing institutional expectations are compartmentalised and not reconciled (Pache & Santos, 2010). One example is the case of Arthur Anderson. The firm has been one of the largest accounting and auditing firms (the then Big Six) and recognised as a “leader in the push to provide [management] consulting services” (McDougald & Greenwood, 2012, p. 95)

to audit clients. Conflicts between the audit and the consulting side of the firm intensified after the early 1990s. Andersen's consultants gradually became dissatisfied with their exclusion from positions of influence held by accounting partners. Although they generated twice as much revenue than the accounting side, their share in the firm's profit remained low (McDougald & Greenwood, 2012; Messner, Clegg, & Kornberger, 2008; Rao & Giorgi, 2006). McDougald and Greenwood (2012, p. 105) note that "in effect, consultants were subsidising accounting partners and yet were not afforded equal status in the management of the firm." Ultimately, the consulting side of the business formally split in 2002, renaming itself Accenture. Messner et al. (2008, p. 73) speak of conflicts between "the trustee logic and the performance logic" that could not be resolved.

Existing accounts also indicate that failure to integrate competing logics led to a 'slip' from a dominant professional logic to a market-corporate one (Covaleski, Dirsmith, & Rittenberg, 2003; Gabbioneta et al., 2014; Grey, 2003). While Brock et al. (2007) portray global MDPs as blended hybrids where a professional logic prevails, they also predict "a continuing trend away from professional values toward corporate values" (p. 242). This abandonment of professional ideals in favour of commercialisms has been linked to corporate scandals in the literature (Gabbioneta et al., 2014; McDougald & Greenwood, 2012). Again, Arthur Andersen is a prominent example. After formal separation from Accenture, auditors at Anderson sought to expand their consulting revenues as well. Rao and Giorgi (2006, p. 279) note that the managing partner at Anderson sought to "replace the vigilant and independent auditor with an 'Eye of the Tiger' accountant keen to seize opportunities and sell services to clients." Ultimately a commercial oriented logic "rose from a supportive to a dominant role, with adverse consequences for the organization" (Greenwood et al., 2011, p. 356). As the importance of management consulting grew, the firm increasingly became captured by their clients and auditors abandoned objectivity and independence to secure management consulting revenues (McDougald & Greenwood, 2012; Suddaby et al., 2007). This became visible in the financial scandal around Enron's bankruptcy where high-risk accounting practices were ignored by Arthur Anderson auditors in order to meet the client's demands. The result was the demise of Arthur Anderson, legislative changes that prohibited firms from providing non-audit services to assurance clients, and ultimately damaged credibility of the entire auditing industry (see McDougald & Greenwood, 2012, for more a detailed account).

In essence, the failure to “discriminate between, and sustain, competing logics” (Jarzabkowski, Smets, Bednarek, et al., 2013, p. 42) gradually shifted field’s dominant logic and over-privileged the demands of the market-commercial logic (Gabbioneta et al., 2014; Grey, 2003; Suddaby et al., 2009; Suddaby & Viale, 2011; Zeff, 2003b, 2003a).

This shift in the accounting field’s dominant logic became visible in various ways; firm’s adopted performance-measurement systems and promotional practices that reward cross-selling (McDougald & Greenwood, 2012), profit maximisation (Wyatt, 2004), or business development (Grey, 2003). The recruitment of non-accounting professionals who gradually gained influence changed the “internal culture of the accounting firms” (Wyatt, 2004, p. 50). Accounts indicate that all professionals gradually internalised a commercial oriented logic (not only management-consulting professionals). Professional rhetoric was increasingly framed around commercial value-added (Lander et al., 2013), client satisfaction (Anderson-Gough, Grey, & Robson, 2000; Covaleski et al., 2003), or strategic selling (Spence & Carter, 2014). Accountants and auditors started to refer to themselves as ‘business advisors’ (Greenwood et al., 2002), emphasised the importance of commercial acumen (Greenwood & Suddaby, 2006; Malsch & Gendron, 2013) and adopted formal dress codes (Covaleski, Dirsmith, Heian, & Samuel, 1998).

Other scholars argue that professional identities were “increasingly framed around logics of efficiency and commerce [...] which have displaced traditional logics of ethics and public service” (Muzio, Brock, & Suddaby, 2013, p. 700). Along the same lines, Thornton et al. (2005, p. 133) argue that the field’s commercial-market logic is reflected in the identities of contemporary accountants “grounded in the belief that accounting is an industry in which attention should be focused on selling services and generating profits”. As the field’s dominant logic gradually shifted, actors felt “compelled to adopt new role structures as a means of signifying both understanding of, and compliance with, the revised ‘rules of the game’” (Suddaby et al., 2007, p. 348). This is demonstrated empirically by Malsch and Gendron (2013) who conclude that commercialism constitutes a significant element of an accountant’s habitus that they “need to display if they wish to be promoted to partner” (p. 880). In their study of Big Four accounting firms, Spence and Carter (2014) found similarly that professionals who embody a commercial-professional habitus, revealed by language that emphasised “making money for the firm” (p. 954), were more likely to be promoted to partner.

3.4.4 Two ideal-typical logics in professional settings

Based on the previous section, Table 3.2 summarises the two ideal-typical institutional logics that underpin much of the research on professional service innovation and the related institutional dynamics. The table summarises how existing contributions on professions, PSFs and professionals have empirically differentiated between the two. Consistent with existing literature on institutional logic, Table 3.2 integrates the societal corporate and market logic (see Table 2.1.) into a field-level commercial-market logic that emphasises the ‘for profit’ orientation of professional work (Thornton et al., 2012).

	Professional logic	Commercial-market logic
<i>Organisational strategy</i>		
Basis of strategy	Narrow range of services (Greenwood & Suddaby, 2006; Thornton et al., 2012); organic growth through increased sales (Thornton, 2002)	Diversified services (Greenwood & Suddaby, 2006); increase profits and cash-flows (Thornton, 2002); growth through M&As (Thornton et al., 2005)
Market approach	Marketing considered as inappropriate (Hogan, Soutar, McColl-Kennedy, & Sweeney, 2011) or prohibited (Greenwood & Suddaby, 2006)	Deliberate marketing and corporate branding (Brock et al., 2007; Pinnington & Morris, 2003); differentiate on client service (Thornton & Ocasio, 2008)
Legitimacy and knowledge claims	Statutorily sanctioned (Muzio & Faulconbridge, 2013; Thornton et al., 2012); technical expertise (Faulconbridge & Muzio, 2016), independence and public benefit (Smets, Morris, & Greenwood, 2012);	Commercial value-add of services (Cooper et al., 1996; Hodgson, Paton, & Muzio, 2015; Kirkpatrick & Noordegraaf, 2015), 'one-stop-shop benefits' for clients (Suddaby & Greenwood, 2005);
<i>Organisational practices and processes</i>		
Means of service delivery	Client's as 'recipients' of professional services (Greenwood & Lachman, 1996); Appropriate solutions and knowledge defined by professionals (Reay & Hinings, 2009); services are delivered by professionals who sell them (Cooper et al., 1996);	Client as co-producers (Greenwood & Lachman, 1996); Focus on client satisfaction (Anderson-Gough et al., 2000); separation of sales and delivery (Cooper et al., 1996);
Governance, structures and processes	Partnership form (Goodrick & Reay, 2011); management by professionals (Brock, 2006); management as a part time role (Morris, 2008); profit sharing (Brock et al., 2007); peer evaluation, consensus based governance and minimal formalisation, standardisation and supervision (Brock et al., 2007; Greenwood et al., 1990; R. Hinings et al., 1991)	Management by non-professionals (Empson et al., 2013); individualised KPIs (Brock et al., 2007); emphasis on cross-selling (Wyatt, 2004), winning/retaining clients (Spence & Carter, 2014) and profitability (Thornton et al., 2005); purposeful leverage structures (Brock et al., 2007); higher levels or routinization and formalization (Faulconbridge & Muzio, 2016);
Human Resources	Unitary (one profession) workforce (Goodrick & Reay, 2011; Greenwood & Suddaby, 2006);	Diverse (multi-profession) workforce (Greenwood & Suddaby, 2006);
<i>Values and knowledge</i>		
Key elements of identity	Professional services as a craft (Greenwood & Suddaby, 2006; Thornton et al., 2012); Identity based on the quality of professional work and technical expertise (Brock et al., 2007; Spence & Carter, 2014; Thornton, 2004); conservatism (Thornton et al., 2005) and risk adversity (Barratt & Hinings, 2015); commitment to profession (Faulconbridge & Muzio, 2016; Suddaby et al., 2009)	Professional services as a business (Greenwood & Suddaby, 2006; W. W. Powell & Sandholtz, 2012); role identity as business-oriented advisor (Greenwood et al., 2002; Smets, Morris, & Greenwood, 2012); efficiency and profitability of services delivered (Noordegraaf, 2015); commitment to employer (Faulconbridge & Muzio, 2016; Suddaby et al., 2009)
Knowledge & Experience	Informal networks (Greenwood & Suddaby, 2006); individualised client relationships (Faulconbridge & Muzio, 2016)	Institutionalised knowledge (Greenwood & Suddaby, 2006) and client relationships (Faulconbridge & Muzio, 2016);

Table 3.2: Professional vs. commercial-market logic

As argued throughout this chapter, the “apparent stability and strength of institutional structures in professional contexts” (Reihlen & Werr, 2015, p. 268) makes divergent change inherently challenging. In a review, Barratt and Hinings (2015, p. 248) express this fundamental assumption when they contend that any “innovation which cannot be firmly connected to the professional logic can therefore be expected to be met with resistance.” The literature has also shown that some actors have adopted organisational forms and practices that challenged the dominant logic of some professional fields (Kipping & Kirkpatrick, 2013). While this shift in logics was precipitated by exogenous pressures, the promotion of alternatives as legitimate ways of organising dependet on the purposeful efforts of embedded actors who increasingly drew upon a commercial-market logic.

3.5. Actors and agency in professional service innovation

Malhotra et al. (2006, p. 192) note that exogenous dynamics might facilitate institutional change in professional fields, but “these pressures in themselves are not sufficient to produce change; rather, it depends on how organizations in the field interpret and respond to them.” The literature has shown how actors in professional fields exploited entrepreneurial opportunities in their purposeful efforts to disrupt institutionalised practices and organisational forms in order to promote alternatives (Suddaby & Muzio, 2015). Because research on actors and agency in the context of institutional change has already been discussed in section 2.6, in detail, this section refers only to a few seminal contributions in the context of professional service innovation.

Sherer and Lee (2002) locate the origins of institutional change in the legal field in high profile law firms that were motivated by scarcity in human resources to abandon the institutionalised ‘up-or-out’ promotional system. Also Greenwood and Suddaby (2006) study institutional change that emerged from central actors in a mature field (accounting). They conceptualise large PSFs as unified actors and draw on Seo and Creed's (2002) contradiction framework to explore why the large accounting firms abandoned the dominant logic's prescribed organisational form (the P² archetype) and pioneered multi-disciplinary practices. Greenwood and Suddaby (2006) argue that firms were motivated by adverse performance due to declining demand for auditing services, aware of alternative possibilities because of their access to global clients and exposure to various organisational fields, and open to new

ideas as they outgrew the normative influences of the regulating professional associations. Due to their dominant market position, those firms gradually bridged organisational fields which lowered their embeddedness and fostered insights into different ways of organising for, and delivering, professional services (Suddaby & Greenwood, 2005; Thornton & Ocasio, 2008). It is noteworthy that Greenwood and Suddaby (2006) draw only on Seo and Creed's (2002) notion of institutional contradiction that created awareness and motivated firms to engage in institutional entrepreneurship. They deliberately exclude the practical action (praxis) that those firms drew upon to achieve change. Also, while preceding literature located the origins of change or stability in field-level actors (professional associations), this stream of literature portrays their role as secondary to the field's largest firms.

Greenwood et al. (2002) also study attempts of large accounting firms to establish multi-disciplinary organisational forms. They propose a process model of institutional entrepreneurship where precipitating social, technological and regulatory jolts motivate firms to act entrepreneurial. Firms initially innovate in relative isolation to locally perceived problems based on economic considerations. Greenwood et al. (2002) observe that diffusion of local innovations and the resulting shift in the field's logics occurred when, for example, professional accounting associations endorsed multi-disciplinary practices as a legitimate organisational form, and redefined the role of professional accountant as "all-round business advisors" (p. 66). Although triggered by economic rationality, the professional associations, in conjunction with the large firms, justified the change based on the "core values of objectivity, integrity, and service" (p. 72). By drawing on vocabulary that reflected the profession's dominant logic, actors actively sought to develop normative legitimacy and to redefine "the institutional logic that establishes what it means to be a CA [Chartered Accountant], and what is an appropriate way of being organized" (p. 76). Suddaby and Greenwood (2005) analyse the discursive strategies of proponents and opponents of multi-disciplinary practices in more detail. They find that actors (large PSFs) used institutional vocabulary to expose the underlying contradictions inherent in the professional logic, engaging in theorisation by connecting prevailing and potential alternatives to broader cultural templates. Similarly, Covalleski, Dirsmith and Rittenberg (2003) show how professional associations and large accounting firms deployed "societally-prized, though highly abstract" (p. 349) terms such as "client service" or "value-add" to legitimise new work

practices. More recently, Suddaby, Saxton and Gunz (2015) examine how social media is used as a rhetorical device by large accounting firms to promote existing practices and new forms of expertise.

Most of the literature on professional service innovation and its institutional implications has in essence focused on field-level actors (firms and professional associations), and the discursive strategies utilised to disrupt the dominant logic of professional fields, and to endorse an alternative (see Suddaby & Viale, 2011). Much less emphasis has been put on the intra-organisational and micro level dynamics involved. While institutionalists have recently redirected their attention to the individual-level analysis in order to explain macro level institutional phenomena (e.g., Suddaby et al., 2016), insights into the context of professional service innovation are largely missing. An exception is the work by Smets and colleagues (Smets & Jarzabkowski, 2013; Smets, Morris, & Greenwood, 2012) who locate the origin of hybrid legal work practices in the everyday work of lawyers. Two logics (a more commercial-market logic enacted by English lawyers, and a fiduciary, professional one enacted by German lawyers) collided in the local practices of cross-border services, resulting in a hybrid 'Anglo-American' logic that emerged within the studied firm. Here an alleged shift in field-level logics originated from the very nature of work; when actors experienced institutional complexity; when they increasingly interacted with lawyers from other jurisdictions and developed pragmatic solutions to the problems their clients faced. Empson and colleagues (2013) analyse the "corporatisation" of large international law firms. They identify a dyadic relationship that develops between two distinct types of professionals: a managing partner (a lawyer), and a management professional (a non-lawyer). In this study, the relationship between these actors served as a key mechanism for institutional work: by working together, individuals took advantage of differences in their relative social positions, specifically their formal authority, specialist expertise, and social capital.

3.6. Chapter summary

The aim of this chapter was to elaborate why the professional service sector is an appropriate context in which to study institutional phenomena and the individual actions involved. Based on a review of sociological and organisational scholarship, this chapter first focused on institutional stability in professional fields that emerges from a dominant logic of

professionalism. In particular, the first section highlighted the often-presumed incompatibility of professional ideals with a commercial-market orientation. The chapter then moved to change and innovation in professional fields, and identified external drivers that motivated PSFs to adopt more business-like structures and to diversify their services. The subsequent sections focused on the institutional dynamics involved. This chapter has shown, in particular, that the diversification of PSFs into non-traditional areas of expertise, and the related adoption of multi-disciplinary organisation forms, has introduced a commercial-market logic to some professional fields. The last section considered actors and their purposeful efforts in undermining the field's dominant (professional) logic and promoting the alternative commercial-market logic. While existing literature in this context focused predominantly on field level actors, insights into intra-organisational dynamics are largely missing.

To relate the insights this chapter offered with the broader themes of neo-institutional scholarship discussed in Chapter 2: Research shows that diversification into non-traditional areas of work, and attempts to establish so called multi-disciplinary, one-stop-shops for professional services, have significant institutional implications that warrant attention. Researchers portray contemporary multi-disciplinary PSFs as hybrid organisations that draw upon professional and commercial-market logics. They also shows how mature PSFs challenged a field's dominant logic and promoted an alternative (Greenwood et al., 2006). Insights into the "process of organisational hybridisation" (Schildt & Perkmann, 2016) that is central to this thesis are, however, largely missing. In other words: how did some PSFs become hybrids in the first place; how was the dominant professional logic underpinning PSFs internally challenged; how was an alternative integrated and promoted within firms; and how were conflicts that inevitably arise in the process managed?

Drazin (1990, p. 255) maintains that change and innovation in professional services "can only be understood in terms of contextual constraints imposed upon professionals, and the professional's strategies for overcoming these constraints." Building on this quote, this thesis draws on the assumption that "contextual constraints imposed upon professionals" reflect a dominant organisational logics. In turn, the "strategies for overcoming these constraints" refer to the institutional agency of embedded actors in the process of organisational hybridisation.

CHAPTER 4: Towards a Conceptual Framework

4.1. Aim of the chapter

This research emerged from a general interest in PSFs and their attempts to diversify into non-traditional areas of expertise. From the literature presented in section 3.5, I expected that these efforts were intrinsically intertwined with some forms of institutional agency at the micro level. This assumption was increasingly validated once data collection commenced. More meso level effects emerged as the case organisation simultaneously attempted to develop more commercial acumen and profit orientation amongst professionals and to position itself as a one-stop-shop for professional services. After I consulted the literature again, the institutional logic perspective emerged as an appropriate analytical tool to portray the two world views at play. While the firm's current approach reflected many elements characteristic of an ideal-typical professional logic, the new focus on multi-disciplinarily and commercialism represented significant elements of an ideal-typical commercial-market logic (see Table 3.2). My original interest in individual actors who do work within organisations remained, nevertheless, at the forefront of the enquiry. The two distinct logics constitute the point of departure for examining the actual day-to-day practical work of individuals in their attempts to endorse an alternative logic within their organisation. It also became evident during the research process that the actual consequences of those micro level efforts were somewhat detrimental to the ones intended by the actors. Consequently, the conceptual framework and research questions presented in this chapter neither pre-existed in this form before I entered the field, nor did they emerge entirely from an inductive analysis of the data. They were instead developed abductively through a constant dialog between my "head full of theories" (Weick, 2007, p. 16), and "the unanticipated and the unexpected" (Alvesson & Kärreman, 2007, p. 1266) puzzles that emerged from the empirical material (Locke, Golden-Biddle, & Feldman, 2008).

The aim of this chapter is to demonstrate how the conceptual framework and research questions arose from existing scholarship and a-priori identified shortcomings thereof, but also from puzzles and mysteries encountered in the course of data collection and analysis (see Alvesson & Kärreman, 2007). The chapter begins with introducing the empirical focus on individuals and their (often mundane day-to-day) activities within organisations as an

underexplored element of institutional stability and change. Based on this, the subsequent sections explain not only how the research questions emerged from the identified literature gaps but also to what extent the empirical data played a significant role in their formulation. I introduce the fundamental notion that promoting alternative logics within organisations, and the social position that enables actors to do so, are profoundly interrelated with the practical work of individuals. Second, the potential of gaining valuable insights from studying unsuccessful institutional agency and the unintended consequences is emphasised. This chapter ends with the conceptual framework that positions the research questions, and defines concepts, assumptions and expectations that guided the research (Maxwell, 2013).

4.2. Empirical focus: Individuals inside organisations

As outlined above, early neo-institutional accounts are criticised for their portrayal of micro level actors as passive enactors (or reproducers) of totalising institutional pressures (DiMaggio & Powell, 1991). In response, literature under various labels such as ‘micro-foundations of institutional theory’ (W. W. Powell & Colyvas, 2008a), ‘institutional logics in action’ (Lounsbury & Boxenbaum, 2013; McPherson & Sauder, 2013), ‘a practice lens on institutional complexity’ (Smets et al., 2015) or ‘institutional work’ (Lawrence & Suddaby, 2006) have more explicitly focused on the characteristics and practical doings of actors, who selectively draw upon and shape their institutional environment. In most of those accounts, however, the actor in focus is still the organisation as a whole. This holds true even in publications drawing on the institutional work framework that explicitly emphasises actions “of *individuals* and organizations” (Lawrence & Suddaby, 2006, p. 215, emphasis added).

In this context, Suddaby (2010, p. 17) notes that “institutional work, of course, is conducted by individuals and it is somewhat surprising to me how individuals often disappear from institutional research.” Also in the literature on entrepreneurship in PSFs the lack of studies drawing on an individual level of analysis was noted recently (Reihlen & Werr, 2015). The predominant focus on organisations as actors of institutional change or maintenance furthermore neglects the significance of individuals within those organisations (Greenwood et al., 2014; R. Meyer & Höllerer, 2014). Zilber (2016a, p. 141) notes as a “central point in the criticism of the institutional logics perspective [that] the very micro level—that of individuals and their daily lives within organizations in light of, and reshaping, institutional

logics—is quite missing from institutional logics research.” This seems to be especially relevant in the context of PSFs where much emphasis has been put on powerful collective actors (such as the large accounting firms) and their entrepreneurial attempts to introduce and promote a commercial-market logic in their field (Covaleski et al., 2003; Greenwood & Hinings, 1996; Greenwood & Suddaby, 2006). This research explicitly acknowledges that institutional logics are enacted by individual professionals within organisations and, in turn, that disrupting dominant logics and promoting alternatives necessitates individual practical action situated inside those firms.

4.3. An enabling position as a micro level accomplishment

Having established that this research focuses on the daily work of professionals within PSFs, the theorised importance of micro level actors for institutional stability and change should be evident. Research drawing on Bourdieusian concepts such as field and capital has identified an individual’s social position as an enabling condition for institutional entrepreneurship (Battilana et al., 2009) and institutional work (Empson et al., 2013). Although Battilana (2006) notes that an actor’s social position in a particular field “is not constant [and] changes over time” (p. 661) much research has treated the concept as an antecedent condition that individuals either have or lack. In contrast, Zilber (2013, p. 89) stresses the need to “appreciate the creativity actors use in constructing their positions and resources”. Thus, this research conceptualises an actors social position and related forms of capital as emerging from the practical work through which they are enacted (see Feldman & Orlikowski, 2011). Accordingly, the first question asks:

RQ: How do individual actors construct a social position that enables them to challenge a firm’s dominant logic and to promote an alternative one?

Apart from a general interest in the intra-organisational actors of institutional change and maintenance, this research also seeks to explore the practical activities of those actors as they manage, undermine, promote, combine or challenge institutional logics.

4.4. Promoting alternative logics in praxis

According to Greenwood and Hinings (1996, p. 1048) “change and stability are understood through the ways in which organizational group members react to old and new institutionally derived ideas.” Yet, as mentioned several times, this intra-organisational dimension often

disappears from institutional research. As already discussed, Greenwood and Suddaby (2006) show how the large accounting firms were enabled and motivated to challenge the prevailing (professional) logic in order to promote multi-disciplinary practices as a legitimate organisational form. However, they intentionally exclude the praxis of how those firms achieved change from their analysis. Building on practice-driven, endogenous accounts of institutional change (e.g., Smets, Morris, & Greenwood, 2012) this research focuses explicitly on this element of praxis where intra-organisational actors reorient their behaviour “from unreflective participation in institutional reproduction to imaginative critique of existing arrangements to practical action for change” (Seo & Creed, 2002, p. 231). The remainder of this thesis will use the term institutional agency to refer to such micro level efforts as the term seems more all-encompassing than institutional work (see Seo & Creed, 2002; Zilber, 2002).

Investigating how one institutional logic is promoted inevitably necessitates an acknowledgement that identities, knowledge and practices of organisations are often closely aligned with the dominant logic of the field. In other words, efforts to disrupt a dominant logic or to promote a new one cannot be understood without considering the mundane actions that maintain the prevailing logic. In contrast to most studies which focus on a single form of institutional agency (see Empson et al., 2013 for an exception) this research is built on the premise that all forms of institutional agency, creating, maintaining and disrupting, occur simultaneously. Accordingly, the second research question asks:

RQ2: How do professionals promote alternative logics within their organisations and how is a dominant organisational logics disrupted?

Finally, this research turns to the question whether institutional agency can only be regarded as such if actors are successful in shaping institutional arrangements.

4.5. Exploring the (unintended) consequences of praxis

Although Lawrence and colleagues (Lawrence et al., 2013, 2009; Lawrence & Suddaby, 2006) note that an actor’s purposeful efforts might be unsuccessful or lead to unintended outcomes, most existing research has focused on presumably successful instances of institutional agency. Lawrence et al. (2013, p. 1029) argue that studies of institutional work “tend to concentrate on its connection to intended effects.” Similarly, literature on institutional entrepreneurship is criticised for its focus on heroic actors who accomplished institutional change (Garud et al.,

2007). Mutch (2007, p. 1125) raises the question: “what, however, of those who sought change but were unsuccessful?”. In other words, accomplished alterations in institutional logics constitute the implicit starting point for most studies; from there scholars retrospectively identify the micro level activities or practices that seemingly contributed to or enabled those changes. This interest in both intended and unintended consequences also emerged during data collection and analysis. It became apparent that, although actors engaged in numerous activities that the existing literature would categorise as institutional agency, many actors did not draw on a new logic in their daily work. In fact, efforts to introduce and promote an alternative logic within the organisation triggered outcomes in some cases that were in stark contrast to those intended by the actors. The third and final research question this thesis accordingly seeks to answer is:

RQ₃: What are the consequences of the actors’ micro level efforts to promote an alternative logic within their organisation?

The last section of this chapter introduces the conceptual framework to position the research questions and to introduce and define key concepts.

4.6. Conceptual framework

According to Maxwell (2013, p. 41) a “conceptual framework for your research is something that is constructed, not found. It incorporates pieces that are borrowed from elsewhere, but the structure, the overall coherence, is something that you build, not something that exists ready-made.” Thus, as already outlined, the framework in Figure 4.1 illustrates the idea context of this study as it emerged dynamically throughout the research process.

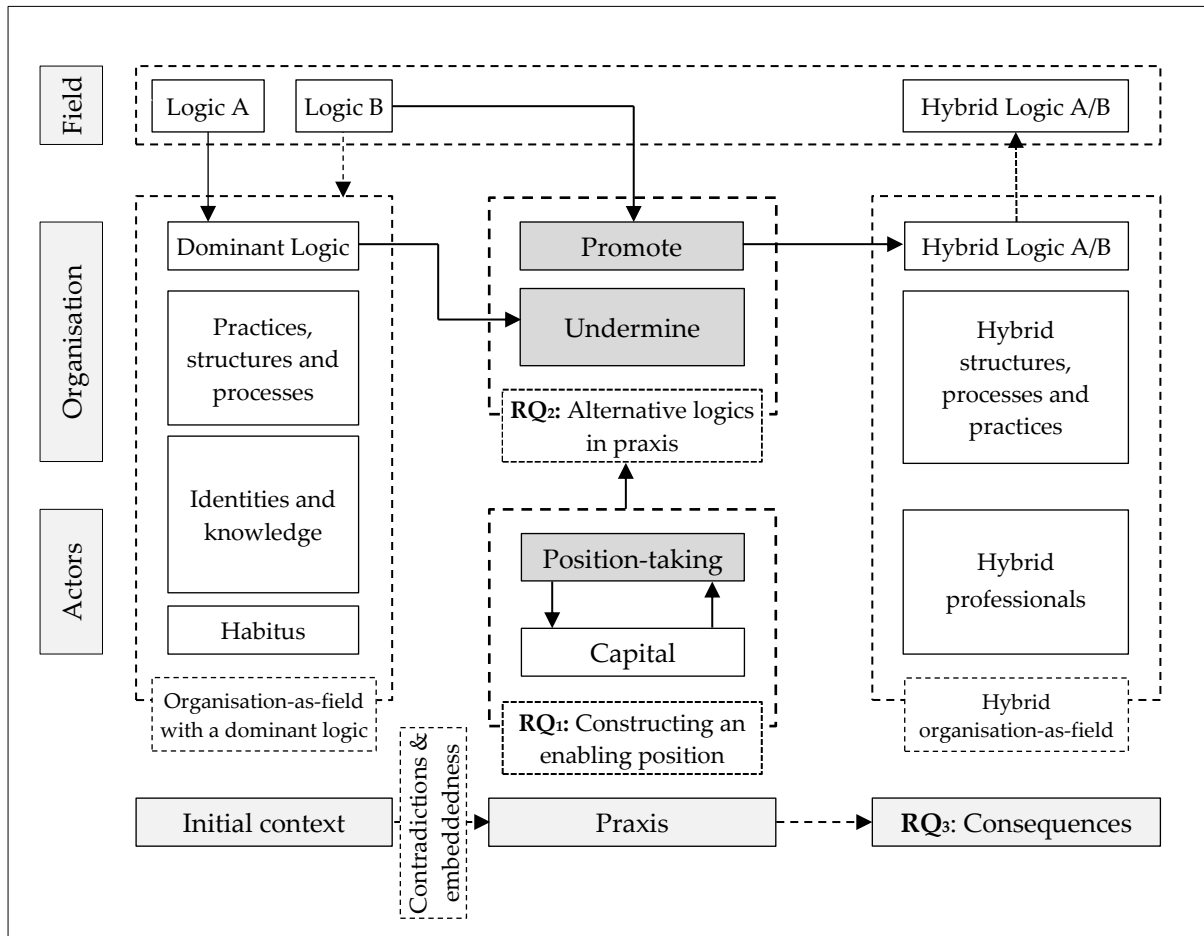


Figure 4.1: Conceptual framework

Drawing on the broader institutional logic perspective and the more recent practice turn in institutional analysis, this thesis conceptualises field-level institutional change (and the absence therefore) as originating within organisations; when actors introduce, promote and integrate alternative logics within an organisation (Schildt & Perkmann, 2016). The remainder of this section introduces the key constructs of the conceptual framework.

Institutional logics and fields. The point of departure for this study is the fundamental notion of dominant institutional logics as “a field’s shared understanding of the goals to be

pursued and how they are to be pursued” (Battilana et al., 2009, p. 69). The literature has shown that highly institutionalised fields are governed by a dominant logic that is relatively stable across a long period of time (Thornton et al., 2012). In literature on professions and PSFs the professional logic was identified as “the dominant ideology” (Suddaby et al., 2007, p. 347) of the field. While most existing accounts conceptualise fields as markets or industries, this research draws on Emirbayer and Johnson's (2008, p. 22) suggestions to apply Bourdieu's ideas to “processes taking place inside the boundaries of organizations”. This call is very much in line with the overarching theme of this research to focus attention onto the inner workings of organisations. Consequently, this thesis conceptualises the research site as an “organisation-as-field” (Emirbayer & Johnson, 2008).

Initial context. An organisation-as-field, populated with actors who possess different forms of capital and practices, and structures governed by a dominant institutional logic, builds the implicit point of origin for this inquiry. As discussed in section 2.3.2, a nested view on institutional logics suggests that actors (individuals and organisations) are always part of a larger social whole (Thornton et al., 2012). Spicer and Sewell (2010) speak of a “dominant organisational logic” that they define as a “meso level construct lying between a fields dominant logic and the sense-making activities of individuals within organisations” (p. 913). An organisation-as-field's dominant logic and the knowledge, identities, structures, processes and practices through which it is enacted or embodied, reflect the dominant logic of the broader organisational field. The co-existence of multiple logics in any organisation-as-field can, however, give rise to some strategic agency that emerges from the constant experience of institutional contradictions (Seo & Creed, 2002).

Practices. Drawing on fundamental ideas from theories of practice, practices constitute “routinized type of behaviour” (Reckwitz, 2002, p. 249) that are informed by a shared understanding of practitioners about meaningful, relevant and appropriate actions in a given situation and context (Schatzki, 2006; Schatzki et al., 2001). In turn, practices “recursively enact and reproduce the general understanding or logic from which they draw meaning” (Smets et al., 2015, p. 936). Referring to Giddens (1984), Langley and Abdallah (2011, p. 221) speak of the “mutually constitutive nature of structure and agency” because practices are constrained and enabled by social structures but “are simultaneously the means by which they are produced and reproduced over time.” Taking up this notion, practices refer to the material

aspects of institutional logic and thus to the relatively stable patterns of activity that are shared by a particular field “and shaped by broader cultural frameworks” (Lounsbury & Crumley, 2007, p. 996). Practices can also take a more codified form in formalised organisational processes and structures (Thornton et al., 2012).

Praxis. In contrast to studies that conclude with a portrayal of multiple, often incompatible, institutional logics, this thesis identifies two logics (depicted as logic A and logic B in Figure 4.1) to set the scene for the actual research. As the research questions indicate, the praxis of individual actors and their everyday work in promoting alternative logics and disrupting dominant ones takes centre stage in this thesis. Practice theorists often refer to praxis as the entire set of “activities carried out in the enactment of everyday life” (Giddens, 1984, p. 242) or “the whole of human action” (Reckwitz, 2002, p. 249). This thesis in contrast draws on Seo and Creed’s (2002, p. 230) notion of praxis as the “conscious and purposeful departures from institutionalized social patterns”. Praxis refers consequently “emphasizes [an] agents’ ability to artfully mobilize different institutional logics and resources, appropriated from their contradictory institutional environments, to frame and serve their interests” (Seo & Creed, 2002, p. 240). As a result, praxis entails some projective degree of agency that is “directed toward the future” (Emirbayer & Mische, 1998, p. 962) in order to disrupt a dominant organisational logic and to promote alternatives. However, given the embeddedness of actors in a field, any praxis is shaped by (and might skilfully exploit) the practices of a social setting.

Habitus, position-taking and capital. Research shows that an actor’s enabling position to engage in praxis emerges from different forms of capital that an individual possesses (Battilana, 2006). Zilber (2013, p. 89) however notes that an actor’s social position and related capital “is defined not by what it is, but by the practices through which it is enacted”. To account for social position as a skilful accomplishment, this thesis draws on Bourdieu’s lesser known concept of position taking (Bourdieu, 1996, p. 231). This refers to the actors strategies and actions to signal their social position (Lockett, Currie, Finn, Martin, & Waring, 2014) and through which they distinguish themselves from others within their field (Emirbayer & Johnson, 2008). According to Lockett et al. (2014, p. 1126) an actor’s position-taking “is inseparable from the social position occupied by the actor as a result of his or her capital endowments”. Position-taking refers to the enactment of capital in specific social situations.

An actor's habitus that is shaped by the "social origins and trajectories of organizational members" (Emirbayer & Johnson, 2008, p. 29) makes it more likely an individual acts, perceives and thinks according to a field's doxa (Chudzikowski & Mayrhofer, 2011). The habitus gives rise to a limited number of position-takings that can be perceived (or are considered appropriate) by actors within a particular field (Bourdieu, 1984; Emirbayer & Johnson, 2008). Scholars conversely argue that those "agents with a habitus not consistent with the field's dominant logics are able to bring about a radical change" (Malsch & Gendron, 2013, p. 885). Emirbayer and Johnson (2008, p. 30) refer to this generative notion of habitus as enabling strategic action and organisational innovation "especially when dissonances between the conditions under which the habitus was acquired or subsequently shaped and the current organizational setting allow organizational members to see windows of opportunity hidden to other members of their own organization."

Organisational hybridisation. In contrast to the notion of shifting logics where one dominant logic (Logic A) is replaced or usurped by an alternative (Logic B), hybridisation refers to the combination, blending or sedimentation of supposedly contradictory or competing logics into a hybrid organisational logic A/B. Hybridisation can thus be understood as a process where actors reshape behavioural, cognitive, cultural and structural elements that incorporate elements of multiple logics (Battilana & Dorado, 2010; Schildt & Perkmann, 2016). The envisioned outcome of the praxis in the centre of this study is therefore not conceptualised as a substitution of the dominant organisational logic; this would require all actors to reorient their behaviour exclusively towards a rival logic. Instead, the term 'alternative hybrid logic' will be used to describe the envisioned situation when elements from both logics are integrated into structures, processes and behaviours. This research is furthermore not so much interested in the hybrid settlement as such. Rather it focuses on the institutional agency—praxis—of individuals when a firm's dominant logic is at least partially abandoned and a new organisational logic that can be considered as hybrid is introduced and promoted. Schildt and Perkmann (2016, p. 5) speak of the 'process of organisational hybridisation' to refer to a dynamic change process where an organisation's prevailing logic is challenged and a previously unfamiliar one is embraced. Building on existing literature, this process refers foremost to the purposeful construction of organisational identities, practices, structures and processes that appeal to multiple logics (Zilber, 2016a). Hybridisation points additionally to

the emergence of hybrid professionals (Blomgren & Waks, 2015). Those incorporate different logics into their identities, knowledge, and behaviour and are able “to define problems and to provide solutions aligning with multiple prevailing logics” (Brock & Saks, 2016, p. 5).

It is important that the hybrid organisation depicted on the right side of Figure 4.1 is understood as an envisioned or preferred arrangement. The actual, real-world outcome of the individual level efforts to which RQ₂ refers might be different because of the potential of unintended consequences. This research furthermore pays little attention as to what extent the hybrid logic emerging within the organisation-as-field contributes to a shift in logics at the organisational-field level. However, building on more recent accounts of micro level dynamics of institutional change (e.g., Smets et al., 2012), it does share the fundamental assumption that field-level institutional change originates when individuals within organisations integrate multiple logics in their work practices.

4.7. Chapter summary

The aim of this chapter was to show how the research questions this thesis seeks to answer emerged from a dynamic interplay between data and theory and to position them in a conceptual framework. I have argued that the institutional logics perspective builds the ideational starting point for this study in terms of practices, structures, processes, identities and knowledge that are deemed appropriate or legitimate in a social setting. Literature has shown that a field’s prevailing logics can change over time. Yet we know little about the individual actors in their organisational setting, and their daily work involved when dominant logics are challenged and alternatives are integrated. Based on this basic assertion, this thesis focuses on professionals and their praxis in articulating, framing and disseminating logics that “challenge existing cultural templates” (Seo & Creed, 2002, p. 243). This is done by utilising Bourdieu’s notion of field, capital and habitus as the theoretical lens to explore how individuals construct a position enabling them to challenge an organisation’s dominant institutional logic. Furthermore, this thesis draws on Seo and Creed’s (2002) framework (see section 2.6.3) that reconciles the embeddedness of actors, experienced contradictions and subsequent institutional agency. The next chapter describes and justifies the research design employed for answering the identified research question.

CHAPTER 5: Research Design

5.1. Aim of the chapter

The previous chapter has shown that this research is interested in individual actors (in their organisational setting) and their daily work in disrupting a dominant logic and promoting an alternative hybrid logic. Based on these premises, the objective of this chapter is to justify the chosen research design. Frankfort-Nachmias and Nachmias (1992, p. 97) define research design as a plan that "guides the investigator in the process of collecting, analysing, and interpreting observations". The basic elements of this research plan are: (1) the fit between the design and the underpinning philosophical paradigm; (2) the 'thing' that will be studied and its context; (3) the methodological approach; and (4) the methods or research tools that are utilised in order to collect and analyse the data (Denzin & Lincoln, 2000a). Building on this logic, the chapter first introduces the paradigmatic assumptions that guided this research. Subsequent sections then justify the adopted research strategy (an ethnographic case study), describe how and why the research site was selected, and clarify the methods of data collection and analysis. This chapter concludes by elaborating the strategies adopted to ensure the trustworthiness of this research.

5.2. Research philosophy

Miles and Huberman (1994, p. 4) contend that researchers have "diverse views of what is real, what can be known, and how these social facts can be faithfully rendered". Kuhn (1970, p. 175) coins the term 'paradigm' to refer to "the entire constellation of beliefs, values, techniques, and so on, shared by the members of a given [scientific] community". Philosophical paradigms can be differentiated according to their ontological, epistemological and methodological assumptions (Morgan & Smircich, 1980). Ontology reflects in essence the researcher's view of reality; epistemology refers to the relationship between that reality and the knowledge that can be obtained from studying it; and methodology denotes the techniques that are used to investigate this reality (Denzin & Lincoln, 2000a). Burrell and Morgan (1979) differentiate between opposing ontological and epistemological assumptions that underpin scientific and philosophical world views, and categorise them into four paradigms. Broadly speaking, the dominant paradigms in organisational research are the

functionalist and the interpretivist (Corbetta, 2003a; Empson, 2001b; Morgan & Smircich, 1980).

The functionalist paradigm is underpinned by a deterministic/realist ontology (Burrell & Morgan, 1979; Suddaby, 2006) and a positivist epistemology (Langley & Abdallah, 2011; Morgan & Smircich, 1980). Researchers who take this stance assume that there is an external reality 'out there' that can be discovered and explained by applying methods from natural sciences. Positivist ideals are thus centred around rules of formal logics, deductive reasoning and falsifiability (A. S. Lee, 1991; Popper, 1968). Contrary to a positivist stance, interpretive researchers view social reality as socially constructed, and thus produced and reproduced in social interaction (Alvesson, 2002; Berger & Luckmann, 1966; Burrell & Morgan, 1979). Implicit in the theoretical framework and research questions outlined in Chapter 4 is that this study is set within an interpretive paradigm. This research is underpinned by a constructivist ontology in its emphasis on understanding "how actors and institutional logics constitute each other in an on-going process" (Zilber, 2016a, p. 147). The constructivist ontology in turn entails an interpretivist epistemology that recognises the subjective and interpretive nature of knowledge and meaning (Burrell & Morgan, 1979; J. Sandberg, 2005), that can be studied only 'from the inside' (Evered & Louis, 1981). These guiding assumptions are elaborated and justified in more detail in the light of institutional scholarship.

5.2.1 Constructivist ontology

A constructionist ontology rejects the notion of human action as a mere mirror of an external reality, asserting that human beings "actively create their realities" when they "impose their internal perceptions and ideals on the external world" (Suddaby, 2006, p. 636). However, while a pure constructivist ontology focuses exclusively on the individual human mind as constructor of meaning, social constructionism emphasises the collective generation of meaning and the way broader socio-cultural contexts "shape the way in which we see things" (Crotty, 1998, p. 58). Social constructionism stresses the dialectic relationship between actors and larger social wholes (Berger & Luckmann, 1966). This notion of a "mutually constitutive and recursive interaction between the actions people take [...] and the patterns these actions create and recreate" (Feldman & Orlikowski, 2011, p. 1245) fundamentally underpins

Giddens's (1984) work on structuration, Bourdieu's (1990) logic of practice, Sztopka's (1991) theory of social becoming, and the 'practice turn' in social sciences in general (Rasche & Chia, 2009; Schatzki et al., 2001).

The ideational origins of neo-institutional theory in organisational studies can be found in Berger and Luckmann's (1966) notion of reality as a social construction (Scott, 1995; Tolbert & Zucker, 1996). For instance, Suddaby and colleagues (2016, p. 3) point out that "at their core, institutions are macro-phenomenological social structures [that] only exist to the extent that large populations of individuals accept that they exist and act in accordance with their agreed existence". Jarzabkowski et al. (2013, p. 47) argue along the same lines when they outline the relevance of practice theories for institutional scholarship (e.g., Bourdieu, 1990; Giddens, 1984; Sztopka, 1991) by maintaining that "institutions are constructed by and, in turn, construct action." More specifically, a constructivist ontology is reflected in the definition of institutional logics as a "socially constructed, historical pattern of material practices, assumptions, values, beliefs, and rules" (Thornton & Ocasio, 1999, p. 804); or the explicit focus of institutional work "on understanding how actors accomplish the social construction of rules, scripts, schemas and cultural accounts" (Lawrence & Suddaby, 2006, p. 218).

To a certain extent, however, those ontological origins faded away in publications which build on these theoretical lenses (Lawrence et al., 2013; Zilber, 2016a). While institutional logics scholarship often takes the logics itself as a given and purely 'top-down' (Zilber, 2016a), literature on institutional entrepreneurship (and to a lesser degree on institutional work) somehow dismisses the embeddedness of actors in their portrayal of agency as overly intentional and purposeful (Emirbayer & Mische, 1998; Smets & Jarzabkowski, 2013). Smets and Jarzabkowski (2013, p. 1280) summarise recent critiques on institutional analysis in terms of having "lost sight of the situated, socially constructed nature of agency and actors". Building on this line of thought, the framework introduced in Chapter 4 points to a (social-) constructivist ontology. This is visible in the conceptualisation of dominant logics that are "attached to organizational activity in symbolic and substantive ways" (McPherson & Sauder, 2013, p. 168), and the more intentional notion of praxis as "the free and creative reconstruction of social patterns on the basis of a reasoned analysis" (Seo & Creed, 2002, p. 225). These paradigmatic assumptions are in line with recent calls raised by

institutional logics scholars to “develop strategic research designs and ways of analysis that would allow capturing the social construction of merit, resource, and subject position” (Zilber, 2013, p. 89).

5.2.2 Interpretivist epistemology

The notion of a reality that “is lived by the subjects of research” and “not fragmentable into variables and processes but experienced holistically and mediated heavily by values, attitudes, beliefs, and the meaning which persons ascribe to their experiences” (Guba & Lincoln, 1982, p. 249) calls for an interpretivist epistemology (Burrell & Morgan, 1979; Lincoln & Guba, 1985). An interpretive researcher does not seek to discover any universal laws or causal explanations but to understand how social reality is created (Morgan & Smircich, 1980) through the “meanings [actors] attach to social life” (Lincoln & Guba, 1985, p. 76). The goal of interpretive research is to what Weber (1922/1978) calls ‘*Verstehen*’ the subjective experiences, beliefs and actions of individuals in their contextual setting (Corbetta, 2003b; Welman & Kruger, 2002). This perspective acknowledges that organisational reality can be understood only from the viewpoint of the individuals under study (Denzin & Lincoln, 2000b; A. S. Lee, 1991; Newell, Robertson, Scarbrough, & Swan, 2009).

Earlier research into institutions (the ‘old’ institutionalism), built on interpretivist assumptions (see Barley, 2008), adopted research designs that are “distinctly subjective in focus, attending to the ways in which institutions are experienced by actors” (Suddaby & Greenwood, 2009, p. 181). Although the fundamental role of human actors is widely acknowledged in definitions of institutional work and logics (Lawrence & Suddaby, 2006; Thornton & Ocasio, 1999), much subsequent research failed to acknowledge that “institutional effects are subjectively experienced and interpreted by actors in organizations” (Suddaby & Lefsrud, 2010, p. 471). In so doing, scholars have focused on field-level dynamics and treated “institutions and organizations as discrete structural objects” (Suddaby & Greenwood, 2009, p. 179) consisting of easily measurable elements (Reay & Jones, 2016). More recent scholarship on practice-based institutional stability and change (Smets & Jarzabkowski, 2013; Smets et al., 2015; Smets, Morris, & Greenwood, 2012; Zilber, 2002) returns to interpretivist assumptions in their focus on subjective experiences at the individual level of analysis (Suddaby & Greenwood, 2009; Suddaby & Lefsrud, 2010). In line with those studies, this thesis adopts an

interpretivist epistemology and corresponding methods of inquiry. The methods of data collection should allow to develop an in-depth understanding of intra-organisational actors, their daily work and the situated meanings they ascribe to their actions (Creswell, 2007; Gephart, 2004; Zilber, 2016a).

5.3. Research Strategy: An Ethnographic Case Study

This section introduces a qualitative case study as an appropriate research strategy in the light of the research questions and the underpinning ontological and epistemological assumptions (Eisenhardt & Graebner, 2007; Yin, 1981). First, this section turns to the question of what the researcher is “exactly looking at” (Verschuren, 2003, p. 128) in terms of the unit and the level of analysis. Based on these considerations, the next section outlines the different elements of the study design and justifies each one. This section ends by elaborating why and how the case was selected.

5.3.1 Unit and level of analysis

The terms ‘unit’ and ‘level’ of analysis are often used interchangeably and contradictory in organisational studies (Klein, Dansereau, & Hall, 1994). To make a meaningful distinction, this thesis draws on Jarzabkowski and Spee's (2009) review of practice-based strategy research and their distinction between ‘type of practitioners’ and ‘level of praxis’. In essence, type of practitioner refers to the unit of analysis that the researcher wants to explain (Merriam, 2009). While much practice-oriented research identifies practices as the fundamental unit of analysis (Gherardi, 2016), the notion of individual praxis points foremost to human actors as the research interest, and only secondarily to practices in terms of a “particular type of widely diffused activity” (Jarzabkowski, Balogun, & Seidl, 2007, p. 9). Referring to intra-organisational actors in practice-based research, Jarzabkowski and Spee (2009) distinguish between two main units of analysis: individuals (e.g., the CEO) and aggregated actors (e.g., the top management team). The conceptual framework and research questions indicate that individual professionals are the main unit of analysis for this thesis to explore “*who* they are, *how* they act and *what* practices they draw upon in that action” (Jarzabkowski et al., 2007, p. 10, emphasis in original). This focus is consistent with the interpretive paradigm in general where “the primary unit of analysis is the individual operating within his or her social and organizational context” (Empson, 2001b, p. 814). The chosen unit of analysis also addresses

relatively recent calls by Brock et al. (2014, p. 8) to explore how individual professionals “manage the structural barriers and unequal opportunities they may encounter”.

The nested nature of institutional logics, however, presupposes that any individual’s praxis is embedded in multiple levels that are often hard to disentangle (Langley, 1999; Thornton & Ocasio, 2008). Jarzabkowski and Spee (2009) distinguish between micro- and macro level praxis where, although interconnected, one might be the focal point of any given analysis. While “examining what people are doing foregrounds micro level praxis, ...focusing upon what is going on in society foregrounds macro level praxis” (p. 73). Building on the terminology introduced in Chapter 4, micro level praxis is the primary research interest of this study, while macro level praxis refers to the more widely diffused (organisational and institutional) practices that actors might draw upon. Thus, although this thesis explores the emergence of a hybrid organisation-as-field (a more meso- or macro level phenomenon) the ultimate interest is on the micro level praxis to achieve this end. Nevertheless, the research design needs to allow for multiple level of analysis to accommodate the actor’s embeddedness and the nested nature of institutional logics.

5.3.2 Study design

As argued throughout this thesis, few studies have focused on individuals and their practical work in the context of institutional change and maintenance. Most of those studies draw on retrospective accounts to explore the conditions that enabled actors to engage in institutional work and the processes and practices involved. In doing so, they privilege successful cases over unsuccessful, often neglecting the possibility of unintended outcomes that may emerge from the actors’ practical doings. Reflecting the predominant data collection method of semi-structured interviews, most forms of institutional agency identified by existing scholarship are additionally of a solely rhetorical nature (Bjerregaard, 2011). Addressing these shortcomings (and in line with the outlined theoretical and philosophical assumptions), this research employs a case study that can be characterised as ‘qualitative’, ‘single’, ‘embedded’, ‘ethnographically informed’ and ‘longitudinal’. These elements will be justified in turn

Suddaby and Lefsrud (2010, p. 464) maintain that “case research methods are ideally suited for the study of institutions”. Broadly speaking, case study research is an “approach in which the investigator explores a bounded system (a *case*) or multiple bounded systems

(cases) over time, through detailed, in-depth data collection involving *multiple sources of information*" (Creswell, 2007, p. 73, emphasis in original). With its emphasis on interpretation, description and the understanding of subjective experiences, case study research falls within the realm of the interpretive research paradigm (Fitzgerald & Dopson, 2009). Case studies involve an in-depth, longitudinal examination of an activity or event—the case (Hair, Money, Samouel, & Page, 2007); they are particularly advantageous to exploring a phenomenon in its real-life context—as it occurs or has occurred (Scholz & Tietje, 2002; Yin, 2003). They are particularly appropriate when ‘how’ and ‘why’ questions require a deep understanding of a phenomenon (Ragin, 2001; Yin, 1981), particularly where organisational and institutional context is considered as important (Langley, 1999). Given those advantages, it is unsurprising that case study research is frequently portrayed as the method par excellence for practice-based institutional research. For example, Lawrence and colleagues (2009, p. 2) highlight the “importance of rich, detailed case studies in understanding the practical actions of individual and organizational actors attempting to create, maintain, and disrupt institutions”.

Although case studies can have quantitative and qualitative elements (Verschuren, 2003; Yin, 2003), existing scholarship predominantly emphasises the need for qualitative research designs to study institutions, institutional logics, and in particular institutional agency. Lawrence et al. (2002, p. 289) call for “fine-grained, qualitative approaches to studying institutional phenomena” and Reay and Jones (2016, p. 442) contend that institutional logics, “which are revealed through language, practices, and manifested in symbols and materials, are naturally suited to qualitative data and methods that demand immersion in the phenomenon”. The interest in individual actors and their praxis that underpins this thesis calls for a qualitative design. For Huff (2009, p. 184) typical goals of qualitative research are to “connect abstract ideas to human experience” and to explain “how and why things happen”. Qualitative data captures “evolving phenomena in rich detail” (Langley & Abdallah, 2011, p. 202) allowing for “close inquiries into the social action” (Zilber, 2013, p. 85) concerning institutions. Building on all these arguments, this research draws on a qualitative case-study design that allows the researcher to understand the subjective nature of reality that is formed through social interactions as individuals are doing their daily work (Langley, 1999).

A principal decision in case study research is between single and multiple-case designs (Yin, 2003). Multiple-case designs (see Eisenhardt, 1989) are typically grounded in

functionalist assumptions in their emphasis on formulating testable propositions through studying multiple cases, and the constant comparison between high and low performing ones (Langley & Abdallah, 2011). In contrast, a single case is more aligned with the interpretive paradigm and thus suitable for research that seeks to develop an in-depth understanding of a complex phenomenon as it develops over time (Dyer & Wilkins, 1991; Langley & Abdallah, 2011). Single case studies are also advantageous for creating unique insights that draw their persuasiveness from the richness of data and vivid descriptions of phenomena (Jarzabkowski, Bednarek, & Lê, 2014; Siggelkow, 2007; Weick, 2007). Building on those arguments, a single case study design was deemed necessary for an in-depth exploration of an emergent hybrid logic within an organisation and of the mundane praxis and practices involved. Studying institutional dynamics in real-time and within an organisation provided a unique and intrinsically interesting setting and thus justifies a single case design (Yin, 2003). The single case approach allowed me to immerse myself in the field over a prolonged period of time in order to capture the interplay between actors' every day activities, their interactions, and their underlying logics in their organizational context. Furthermore, focusing on a single case controlled for possible differences in organisational characteristics (Maxwell, 2013).

Apart from the distinction between single or multiple-case study designs, Yin (2003) differentiates between holistic and embedded case study designs. While a case study with only one main unit of analysis is considered a holistic case study, an embedded case study is characterised by one main unit and data collection and analysis at different levels (Verschuren, 2003; Yin, 2003). An embedded case study allows for an "in-depth investigation [...] within a single organization, generating the subtle and rich data that characterizes case study research" (Farquhar, 2012, p. 42). An embedded case design involves gathering contextual, multi-level data while still focusing on a primary unit of analysis (Scholz & Tietje, 2002; Yin, 2003). The nested nature of institutional logics logically argues for an embedded case design. Although the ultimate unit of analysis is the individual praxis, the embedded design enabled me to capture the interplay of professional activities in their organisational and institutional context (Eisenhardt, 1989; Smets, Morris, & Greenwood, 2012; Smets & Reihlen, 2012; Stake, 1995). The three levels of analysis and the corresponding sampling rational will be elaborated in section 5.3.3 in more detail.

Since most existing case studies on institutional logics and work are based on retrospective accounts (Lawrence et al., 2013), they often fail to acknowledge the fundamental practice-based conceptualisation of those lenses. For instance, Zilber (2013, p. 88) maintains that retrospective interviews and longitudinal archival data do “not allow for the focus on social action” central to institutional logics. Along the same lines, Rasche and Chia (2009, p. 726) refer to practice-based organisational studies and argue that if “practices are shaped by the unconscious nature of the habitus (Bourdieu) that actors draw upon during their performance, we cannot realistically expect to uncover these practices through interviews”. All those arguments are especially relevant in light of the research interest on the failed or unintended consequences of institutional work because they are “more difficult to detect and study in retrospect” (Battilana et al., 2009, p. 95). Furthermore, interviewees tend to rationalise their behaviour ex-post (Zilber, 2016a). For all these reasons, Lawrence et al. (2013, p. 1029, emphasis added) call for studying institutional work by “using less-used research methods – those capturing social action *in vivo* and *in situ* in particular”. This is echoed in recent calls for ethnographic approaches to study institutional logics (Zilber, 2016a), institutional work (Bjerregaard, 2011) and institutional dynamics in general (Barley, 2008). In response to those calls, this research adopted an ethnographic perspective that allowed “glimpses of insight into the inner workings of institution” (Suddaby & Lefsrud, 2010, p. 465).

Building on traditions from cultural anthropology and sociology, an ethnographic researcher “participates, overtly or covertly, in people’s daily lives for an extended period of time, watching what happens, listening to what is said” (Hammersley & Atkinson, 2007, p. 2). Ethnographic research fits well with the outlined paradigmatic assumptions in its theoretical affinity to social constructivism (Silverman, 2010) and its conceptualisation as “an interpretive craft” (Van Maanen, 2011, p. 219) that involves an ongoing engagement of the researcher with the subjects under study. Organisational ethnography upholds these intellectual foundations in its emphasis on “getting close to subjects under study, making available routine aspects of organizational activity for analysis and studying ‘history’ and context” (Neyland, 2008, p. 10).

As some scholars point out, however, organisational ethnography is more theoretically informed and addresses issues that are relevant for organisational studies (Miettinen, Samra-Fredericks, & Yanow, 2009; Yanow, 2009). In contrast, pure ‘anthropological ethnography’ appears more “a-theoretical” (Miettinen et al., 2009, p. 1315)

and often purely descriptive. Ethnography is often associated with “complete involvement” (Spradley, 1980, p. 61), ‘going native’ (Gioia, Thomas, Clark, & Chittipeddi, 1994; Spradley, 1980), and a sustained and prolonged involvement in the field (Neyland, 2008). Organisational ethnographers often seek to maintain a more ‘scientific observer’ role (Miettinen et al., 2009). During my prolonged immersion in the field (six months) and my active involvement in the daily work of some actors, I did not purposefully attempt to become an ‘insider’. I tried always to maintain a reflexive distance from the events observed and make others aware of my role as a researcher (e.g., I introduced myself at the beginning of meetings and asked for permission to make audio recordings). Others began to treat me as an insider over time, increasingly taking my presence for granted; for example, asking for my opinions on the issue, and openly discussing their dissatisfaction with the leadership team.

In line with much existing micro level research (see Balogun, Huff, & Johnson, 2003), this study adopted a longitudinal approach to develop a more holistic perspective (Pettigrew, 1990; Stake, 1995; Yin, 2003). Longitudinal research is carried out over a prolonged period and enables an in-depth exploration of social phenomena, especially as these develop and change (Langley, 1999). It involves “ongoing interactions with participants [that] help to build participant–researcher trust, respect, and collaboration, and this in turn increases the possibility that rich, in-depth data will be generated for analysis” (Court, 2010, p. 535). Longitudinal case studies are a powerful tool to dig deeper, for instance by repeating interviews and observation, into the thought worlds of professional’s to understand the participants’ situated knowing and the taken-for-granted nature of institutions (Court, 2010; Leonard-Barton, 1990). Spending more time in the field enables the researcher to go beyond presentational rhetoric and behavioural shows, and to critically follow up on emergent themes (Barley, 1990). Miles and Huberman (1994, p. 62) note in this context that “the field site has a life of its own that becomes more meaningful and decipherable as you spend time there, sharing the daily routines of actors in the setting.” As will be elaborated below, the longitudinal aspect was put into practice not only by me spending a prolonged period at the research site, but also by the fact that I had access to video recordings of relevant meetings that took place before I entered the field.

5.3.3 Case selection

When conducting single-case study research, researchers can either look for an average case “that is a typical example of a specific phenomenon” or an extreme one “where the social phenomenon is visible in a very pronounced way” (Bleijenbergh, 2010, p. 61). Siggelkow (2007, p. 20) uses the metaphor of a “talking pig” to justify a single-case design “that derives its excitement and justification through little more than the description of a particular phenomenon”. Referring to ethnographic methodology in institutional logic research, Reay and Jones (2016, p. 449) contends that “researchers begin with a general guiding research question about institutional logics and select a research site where they believe that interesting answers to the question may be found.” Keeping those premises in mind, identifying a research site for this embedded single-case study was driven by the general interest in studying shifting logics within organisations (in-situ and in-vivo). As already noted, however, the interest in institutional logics perspective emerged only in the course of data collection and analysis as being particularly suitable to frame my research. Initially, my research interest was more confined in terms of studying the emergence of a new practice area within an organisation that challenged the traditional (institutionalised) boundaries of professions. The sampling criteria at the outset of this study were informed by existing theory (theoretical sampling). First, I restricted potential research sites to PSFs that operate in what von Nordenflycht (2010) labels ‘classic’ or ‘regulated’ due to the highly institutionalised nature of professional work in those sectors. Second, I purposefully tried to identify a PSF that is, at this very time, in the process of establishing a service area that encroaches on the knowledge territory of other professions (due to the institutional dynamics involved). Finally, the actors involved were required to grant me extensive access to study the dynamics in-depth and over a long period of time.

Mindful of these premises, I conducted 33 explorative interviews with executives of mainly large, international PSFs across three sectors: law, engineering and accounting/consulting. These interviews were rather unstructured and revolved around the current challenges the firm faces and the organisational responses to those. Interviewees consistently identified a general trend towards more non-traditional service offerings in response to technological changes and increasingly globalised competition for professional services. For example, as margins in law and engineering firms erode they gradually pursue

more opportunities for new service offerings that can be broadly defined as management consultancy. Participants in engineering consulting firms occasionally mentioned their attempts to expand their service repertoire into areas such as health and safety consulting or financial and strategic advice in the context of construction projects. Following these initial interviews, one New Zealand-based engineering consultancy firm was approached as the research site for this study. The research site and its institutional context can be regarded as "unusually revelatory" (Eisenhardt & Graebner, 2007, p. 27) as the phenomenon of interest was "transparently observable" (Eisenhardt, 1989, p. 537) for several reasons.

At the institutional level, engineering is often mentioned as one of the prototypical professions (Abbott, 1988; Larson, 1977). Schinkel and Noordegraaf (2011, p. 69) refer to engineers as "classic examples" of professions. In those, norms, values and practices are depicted as highly institutionalized and underpinned by a dominant logic of professionalism. At the organisational level, engineering and architecture firms have been described as 'classic PSFs', characterised by a high degree of autonomy, a confined knowledge base and institutionalised structures, processes and practices that reflect the fields dominant logic (von Nordenflycht, 2010). An engineering consulting firm was thus regarded as very suitable to study the intra-organisational practical actions of disrupting a dominant institutional logic and promoting an alternative. The identified firm was also mentioned as a 'thought leader' regarding non-traditional service offerings by engineering consulting competitors. Finally, most of the existing research on institutional work and change in the professional service field has focused on the large accounting and law firms (e.g. Empson et al., 2013; Greenwood & Suddaby, 2006) or on boundary disputes between health care professionals (e.g. Bucher, Chreim, Langley, & Reay, 2016). Much less emphasis has been placed on engineering consultancies despite their status as a classic PSF (von Nordenflycht, 2010). An engineering consulting firm provided therefore simply an interesting setting with the potential to extend the findings obtained from studying other types of PSFs.

Within the selected firm, the main phenomenon of interest was initially identified as the attempt to establish a practice area offering management consulting services to existing clients. However, it emerged in the course of data collection that these efforts were intrinsically intertwined with attempts to promote a one-stop-shop model for professional services together with more commercial acumen in the delivery of existing services. As

discussed in Chapter 3.4, all those elements have been linked to the emergence of a commercial-market logic in professional fields. Also, Seo and Creed (2002, p. 234) maintain that “the locus of praxis is likely to be where multiple, incompatible institutions intersect”. Efforts to promote ‘a new take’ on engineering services were considered as particularly relevant for studying the dynamics involved. Finally, and at the individual level, one professional was identified as a key informant and the first point of contact for this study. This actor plays a key role in the growth of this firm’s management consulting arm and states explicitly on his LinkedIn profile that some engineering consulting firms will soon offer integrated business advisory, design and asset management services and have the same status as the Big Four accounting/consulting firms. Most of the data gathered for this study involved observing this professional in doing his daily work. Professionals on all organisational levels were additionally selected for additional interviews to obtain a broad range of perspectives.

5.4. Methods of data collection

Case studies “typically combine data collection methods such as archives, interviews, questionnaires, and observations” (Eisenhardt, 1989, p. 534) to develop a fine-grained understanding of a phenomenon and its context (Langley, Smallman, Tsoukas, & Ven, 2013). Utilising different data sources allows for triangulation and increases the trustworthiness of findings (Lincoln & Guba, 1985). Referring to ethnographic methods in institutional scholarship, Bévort and Suddaby (2015, p. 8) correspondingly maintain that “direct observation, supported by interviews, archives, and other contextual data will permit the researcher to understand the subjective experience of individuals and the institutional pressures shaping their lives.” This section first justifies participant observation as the primary method of data collection and outlines how the observations were conducted. It then elaborates how semi-structured interviews and documents data supplemented emerging findings from observations.

5.4.1 *Participant observation*

The general research interest in studying institutional dynamics in situ and in vivo, as well as the underpinning interpretivist paradigm, emphasises the need to observe professionals in their natural setting (Lawrence et al., 2013; Lincoln & Guba, 1985; Zilber, 2016a). Consistent with the ethnographic tradition (Katz & Csordas, 2003; Van Maanen, 1979), observations

constituted the primary source of empirical data for this thesis. The key strengths of observation methods are their ability to cover events in real time and in context to develop insights into interpersonal behaviour and motives (Yin, 2003). The institutional framing of this thesis points to observations as they allow the researcher “to ‘see’ institutions in day-to-day actions” (Barley & Tolbert, 1997, p. 109) and to observe “particular people and institutions in order to attend to how and why agents act, feel, and think in the way that they do” (Locke, 2011, p. 614). Observation methods rely on the “personalized seeing, hearing, and experiencing in specific social settings” (Van Maanen, 2011, p. 222) to “examine work practices and relationships in situ” (Barley & Kunda, 2001, p. 84). Given the “physical nature of social practices” (Rasche & Chia, 2009, p. 719) it is unsurprising that practice theorists (e.g., Bourdieu), as well as practice-oriented organisational (e.g., Jarzabkowski & Wilson, 2002; Kaplan, 2011), and neo-institutional scholarship (e.g., Heinze & Weber, 2016; Smets et al., 2015; Smets, Morris, & Greenwood, 2012), frequently employ observation as the primary method of data collection. Drawing on those intellectual foundations, conducting observations allowed me to capture not only actors’ formal and informal interactions (Jarzabkowski et al., 2014); but also non-verbal cues (Corbetta, 2003b; Lincoln & Guba, 1985), and the use of material artefacts (e.g., PowerPoint presentations or Excel spreadsheets) in a particular social setting (Kaplan, 2011).

In conducting the observations, I spent approximately 30 hours per week (more in the first two months of data collection) for the six-month period at the case organisation’s headquarters in Auckland. Initial access was granted by a professional in the firm whom I previously interviewed during the exploratory stage of data collection. This professional was central in promoting non-traditional engineering services (management consulting). He can be regarded as a “key informant [who was] particularly knowledgeable about the inquiry setting and articulate about their knowledge” (Patton, 2002, p. 321). To develop in-depth insights into the mundane, day-to-day activities of this professional, I placed myself at the desk next to him. The professional also introduced me to other members of the organisation in the first week of data collection, gave me an extensive tour of the firm’s premises, organised an electronic swipe card for the building and unlimited access to the firm’s internal IT systems; this emerged as particularly valuable in the context of this research as they were utilised by actors to challenge the firm’s dominant logic and to promote an alternative.

I worked with the professional in projects related to the establishment of the new service area and other efforts aimed at increasing collaboration between the firm's different business units. My approach hints at a fully-fledged ethnographic, participant-observation method. Although boundaries are blurry, participant observation is often associated with anthropology, the researcher's role as a "fully socialized insider" (Nippert-Eng, 2015, p. 238) and his or her "sustained empathetic" (Locke, 2011, p. 616) and active participation in the "daily activities, rituals, interactions, and events of a group of people" (DeWalt & DeWalt, 2011, p. 1). In contrast, organisational ethnography often relies on non-participant observation that is characterised as more structured, relatively short-term fieldwork (Mintzberg, 1970; Watson, 2011) and "a role clearly distinct from that of organizational members" (Liu & Maitlis, 2010, p. 610). Neyland (2008, p. 10) criticizes the "rushed, short-term, non-immersive strategies frequently employed [as] organizational anthropologists rarely take a toothbrush with them these days".

To some extent, my approach addressed these presumed shortcomings because I spent a relatively long time with the firm (on a daily basis) and engaged actively in the daily work there. On reflection, however, I still consider my fieldwork as merely ethnographically informed participant observation. Engaging in the daily work at the research site was not my primary research interest, nor did I intend to influence the work done by actors. Rather, my participation emerged through more pragmatic reasons. I hold a background in management accounting and the key informant needed someone to support him with an Excel model. Offering to 'lend a hand' was primarily done to meet the demands of reciprocity (C. Marshall & Rossman, 2016) and facilitated the access negotiation upfront and subsequent access to participants (see Neyland, 2008). Also, as I will explicate in the findings section, the type of work I did was in stark contrast to the typical activities actors engage in. While I provided decision support for strategic considerations based on financial data, the characteristic approach within the firm was based more on intuition and individual aspirations. Finally, participants were usually aware of my role as a researcher (e.g., because ethics required me to mention my role before every meeting and ask for permission to tape record conversations).

As a consequence, I would characterise my involvement as "moderate participation" (Spradley, 1980, p. 60) because I worked at the firm "merely to gain acceptance" not to actually participate or to influence the daily work practices at the research site. However, despite my

opportunistic motives, my active involvement in the daily life of actors resulted in a significant amount of trust and gratitude that facilitated subsequent access to a wide range of staff within the firm. During the months of data collection, I accompanied the key informant to formal and informal meetings, to presentations that he gave and workshops organised. My approach to participant observation can be regarded as quite unstructured shadowing (McDonald & Simpson, 2014). Building on traditional ethnography, shadowing brings the researcher “closest to everyday managerial work” (Arman, Vie, & Asvoll, 2012, p. 315). In contrast to an observation method, the shadowing researcher takes a more active approach in following the participant over a prolonged period of time (McDonald & Simpson, 2014, p. 14) to examine the way managers do their everyday work (Johnson, 2014). Shadowing is the “method *par excellence* for studying how actors enact organizations through interactions in everyday situations” (Vásquez, Brummans, & Groleau, 2012, p. 145, emphasis in original).

While shadowing typically involves an a-priori defined period (e.g., a week) where the researcher follows the participant constantly, my approach was less structured. Although there definitely were days that I spent close to eight hours in close proximity to the key informant, I did not purposefully document everything he did within a predetermined time period. Rather, I was focusing throughout the entire fieldwork on actions and interaction that seemed significant in the light of my emerging conceptual framework, that appeared strange or particularly meaningful in some way (DeWalt & DeWalt, 2011; C. Marshall & Rossman, 2016; Neyland, 2008). This pragmatic approach was also necessitated by my involvement in diverse projects that required me to focus on producing the output required.

After a short time, professionals other than the key participant started to invite me to meetings that they regarded as relevant to my research. For example, staff who managed and delivered the non-traditional services met on a fortnightly basis to discuss the issues they face (labelled a New Service Workshop). Throughout fieldwork, I tried to voice record the audio at events I observed. While observation methods are often associated with constantly taking field notes (Golden-Biddle & Locke, 1993; Van Maanen, 1979), I soon realised that my active participation in meetings (e.g., when discussing the Excel model I created) did not allow me to do this. However, apart from transcribing the recordings, I wrote down any observations and initial reflections after each event had finished (see Neyland, 2008). Whenever the setting allowed (e.g., when I was not actively involved in conversations), I made more extensive notes

in a notebook. I transcribed all hand-written notes as soon as possible into a Word document and included contextual data (such as the date or the professionals involved). In this document I also noted any “intuitive hunches” (Bargar & Duncan, 1982, p. 3), “emerging patterns” (Corley & Gioia, 2004, p. 184) or puzzles and open questions that arose.

Apart from data gathered from my six month’s involvement in the field, the longitudinal character of this study was significantly enhanced by the key informant’s habit of video recording presentations or meetings. To reach a maximum number of attendees (in different geographical locations) the professional organised such events via the firm’s internal communication tool (Skype for Business) and used the software’s video recording capability to capture those. These recordings included not only verbal remarks from presenter and participants, but also the PowerPoint slides that were used and any comments participants made via the tool’s instant messaging capability. Although observations capture in-situ actions and interactions and allow for subjective interpretations, these should be validated or at least complemented with other data sources (Neyland, 2008). Watson (2011, p. 206) argues that “participant observation can be considerably strengthened if, alongside it and possibly at the same time, interviews are carried out, documents are analysed, statistics are collected, and perhaps even small surveys undertaken.”

5.4.2 Semi-structured interviews

Alvesson (2009, p. 158) maintains that “without the accounts of the people being studied, it is very difficult to say something about the meanings of ideas guiding particular behaviour and practices.” While observations were the primary source of empirical data for this study, interviews were conducted to elicit further information, to verify interpretations and to discuss initial findings (Neyland, 2008). Broadly speaking, those interviews moved from quite standardised, open-ended interviews in the earlier stages of the field work to more informal, conversational interviews in the later ones (Patton, 2002). Shortly after entering the field, I conducted initial semi-structured interviews with participants from all organisational levels. Participant selection was facilitated by the key informant (see appendix) who identified professionals that were involved in delivering or managing the non-traditional services (from junior professionals to the general manager and a member of the board). In an introductory email that was sent to potential interviewees, the key informant included a brief introduction

of my research area and mentioned that I am working with him on related projects. Regarding the format of the interviews in ethnographic research, Van der Waal (2009, p. 35) maintains that they "should (preferably) remain semi-structured rather than structured, thereby allowing maximally for the organization of knowledge from the inside perspective." My initial theoretical framework also provided some general idea as to which questions to ask and their sequence (Lincoln & Guba, 1985; C. Marshall & Rossman, 2016). I thus prepared an interview guide in advance that outlined the broad topic areas that I wanted to cover (Corbetta, 2003b; Yin, 2003).

I undertook my "homework in relation to the respondent" (Lincoln & Guba, 1985, p. 270) prior to each interview by downloading their CVs from the firm's intranet and their LinkedIn profiles. This allowed me to include tailored questions in cases where those publicly available sources contained information that seemed relevant or intruding (e.g., a background in management consulting firms). Interviews lasted from 30 minutes to 1½ hours and were conducted in meeting rooms at the firm's premises. The questions were personalised to each interviewee, but typically included the individual's background, the type of services delivered by a particular service area, the main competitor and the challenges they face when doing their work (see Appendix I). The more long serving professionals provided rich insights into the firm's history, its structure, processes and cultural aspects. The semi-structured interview approach enabled me to probe beyond the initial answers and to enter into a dialogue with the interviewee (May, 2010). At the end of each interview, I asked the participants for any questions they had or any issues they wanted to discuss.

As my familiarity with the organisation grew, my role changed "from a naïve outsider" (Fontana & Frey, 2000, p. xx) to some kind of "peripheral membership role" (Adler & Adler, 1988, p. 402). Nevertheless participation in activities remained secondary to the role of information gatherer (Merriam & Tisdell, 2016). Correspondingly, the interviews I conducted became increasingly informal and conversational, but also more in-depth, focusing on observations and my emerging understanding of the participants' social world. Increased socialisation and prolonged fieldwork also led to increased trust and recognition as a 'peer' (Lincoln & Guba, 1985, p. 269) by respondents. For instance, in later stages of the fieldwork I scheduled follow-up interviewees with several respondents to discuss additional questions, observations and inconsistencies that emerged. During those, many participants would

(unprompted) discuss their frustration with the leadership team, ask for my opinion on the issues they face, and even mention their marital problems (for which they blamed the firm for). The regular catch-ups with the key informant became much less formal over time and revolved increasingly around field observations. Those allowed me to probe more deeply into “the meanings that everyday activities hold for people” (C. Marshall & Rossman, 2016, p. 150) and to check my emerging interpretations and understanding of the observed praxis (Lincoln & Guba, 1985; see Smets et al., 2015). Despite my increasing familiarity and acceptance, I tried to maintain a sceptical distance, remain open for alternative interpretations, and to be constantly sensitive to my own biases (Creswell, 2007; Maxwell, 2013). As with all meeting observations, I asked for permission to record the interviews at the beginning of each one (participants also had to sign a consent form before interviews were conducted).

I myself transcribed all relevant recordings (interviews, audio recorded observations and existing video recordings) and included screenshots of PowerPoint (in case the recording was related to a presentation or workshop) slides in the transcribed document. This facilitated data analysis as I could see the participants’ spoken words right beside the slide they were discussing. Manual transcription provided a first opportunity to note initial interpretations, emerging ideas, puzzles and reflections (which I included at the end of each document) and to familiarize myself with the data (DeWalt & DeWalt, 2011; Dey, 1993).

5.4.3 Internal and external documents

Documents in case study research are especially useful to “corroborate and augment evidence from other sources” (Yin, 2003, p. 103). They can supplement observations and interviews and enable an increased contextual understanding (Guba & Lincoln, 1982; C. Marshall & Rossman, 2016). The main advantages of documents are their unobtrusiveness because they are produced independently of the fieldwork (Webb & Weick, 1979; Yin, 2003). They also allowed the capture of historical accounts of events that happened before fieldwork commenced (Lincoln & Guba, 1985). Most documentary evidence collected for this research constituted secondary data and was used to triangulate primary data (interviews and observations). Given the embedded nature of this case study, documents enabled me to collect additional data on the organisational and institutional levels of analysis and therefore to contextualise observations of individual praxis as described by Pettigrew (1997).

Internal documents were used to develop an in-depth understanding of the firm's history, strategy, structure and processes. I initially used the search function of the firm's intranet and knowledge-management system to locate documents. These consisted of presentations for new employees (outlining important facets of the organisation), promotional material (e.g., for the new services), training material, weekly email updates or a document that outlined the firm's history in great detail. I asked informants for documents (e.g., presentations) used in the meetings or workshops I observed. I also collected external documents from the firm's website, the LinkedIn profiles of professionals, or newspaper articles that commented on significant leadership changes. I located publicly available interviews that were conducted by Engineering New Zealand (previously the Institution of Professional Engineers New Zealand) with professionals who were significant in the firm's history. Finally, I consulted academic and professional literature on engineering, engineering consulting and management consulting to increase my understanding of the broader institutional field.

Another set of documentary evidence can be regarded as primary data because they constituted a significant element of the individual's praxis. First, this refers to the PowerPoint presentations that were utilised in presentations to promote alternative ideas. These consisted of slides, and annotations included to guide the presentations (e.g., the main points the presenter wanted to convey). Another significant source was the firm's internal social network Yammer. Now incorporated into Microsoft's Office environment, Yammer is an enterprise social networking tool that is accessible only to members of an organisation. It allows staff to post status updates about their daily work, share internal and external information, create groups to facilitate communications about specific topics or to comment on and 'like' the contributions made by their colleagues. Around two thirds of the staff at the case firm is using this platform either actively or passively. The key informant for this study regards himself as one of the most active users and posts content on an almost daily basis. Table 5.1 quantifies the main sources of data collected for this study.

	Data Source	Data Type	#
Explanatory phase	Executives of large PSF in mature sectors (law, engineering, accounting)	Semi-structured interviews	33
Six month participant observation	<i>Key informant:</i> Business Director of non-traditional service area (Advisory Services)	In-depth interviews	9
		Meetings observed	34
		Recordings of past presentations	40
		Yammer posts	≈150
	<i>Other informants:</i> Professionals on all organisational levels	Meetings observed	17
		Semi-structured interviews	32
Archival Data	Firm intranet and website, internal social network, public sources such as newspapers, libraries, practitioner and academic literature on engineering consulting	Documentary evidence on firm history, project proposals, advertising material, etc.; Insights into the broader field	≈200

Table 5.1: Summary of empirical data collected

5.5. Methods of Data Analysis

To facilitate data analysis, I organised the data in a structured way throughout data collection (Merriam & Tisdell, 2016). The first step was done in an Excel file where I continuously entered all data collected depending on the data source (interviews, meetings & workshops, past recordings, archival data) together with relevant metadata (e.g., meeting participants, meeting agenda, position title of interviewees). As already noted, I annotated interview and observation transcripts with initial descriptions, preliminary analysis and reflections. I converted PowerPoint files into PDF's that included both the actual slide and also the notes the key informant added for himself. I also exported the relevant Yammer posts (including the date, author and respective comments) into PDF's. The entire data set was imported into the qualitative data analysis software NVivo 11.0 and relevant classifications such as the type of data (interview, observation or archival data) and the data source (e.g., name of interviewee and the position title) were added. Using NVivo facilitated the analysis in several ways. It allowed me to store passages of text and visual material (e.g., pictures used in presentations) in nodes and flexibly reorganise, merge or delete those. Nodes could also be organised in hierarchical trees in order to develop categories and subcategories. Moreover, nodes could be used in concept maps to graphically illustrate emerging patterns or relationships between them (Richards, 1999, 2015).

Stephen Barley (2016, p. 468), one of the most prominent organizational ethnographers, notes in a recent book chapter that “what ethnographers actually do when they collect analyse data is not easily explained”. He then points out that methods sections in qualitative (ethnographic) research have become a genre by themselves with almost “ritualistic adherence [to] specific stylistic and substantive conventions which only the foolish break”. He critiques that many authors think “it’s a good idea to use the term grounded, ideally joined at the hip with the term theory”, and that is has “become *de rigueur* to talk about how one started with first-level codes then moved on to second level codes [...] aggregating and subsuming earlier codes as one goes along” (2016, p. 470, emphasis in original). Referring to grounded theory (Glaser & Strauss, 1967) in organisational ethnography, Watson (2012, pp. 18–19) suggests that instead of resorting to this “fiercely inductive [approach] the investigator works iteratively, switching back and forth (sometimes even minute to minute) between the inductive and the deductive”. Keeping those remarks in mind, I do not attempt, in the remainder of this section to forcefully rationalise the strategies I utilised to analyse and interpret the empirical evidence.

Instead of providing an overly sanitised account of the analysis, my aim is to show how I derived at the findings through a constant iteration between more deductive phases that emerged from my “head full of theories” (Weick, 2007, p. 16); more inductive ones as empirical data gave rise to new ideas; and the puzzles, frustrations and cul-de-sacs I encountered along the way. I thus essentially followed an abductive theory-building process by constantly iterating between data and theory (Gioia, Corley, & Hamilton, 2012; Mantere & Ketokivi, 2013; Van Maanen, 1979). Haedicke and Hallett (2016, p. 99) refer to abductive theorising in institutional research in terms of moving “between quasi-deductive moments and more inductive moments, with the moments of surprise that inevitably arise in qualitative research serving as a shifting point between these positions”. Figure 5.1 visualises the various stages of data analysis in a very simplified form.

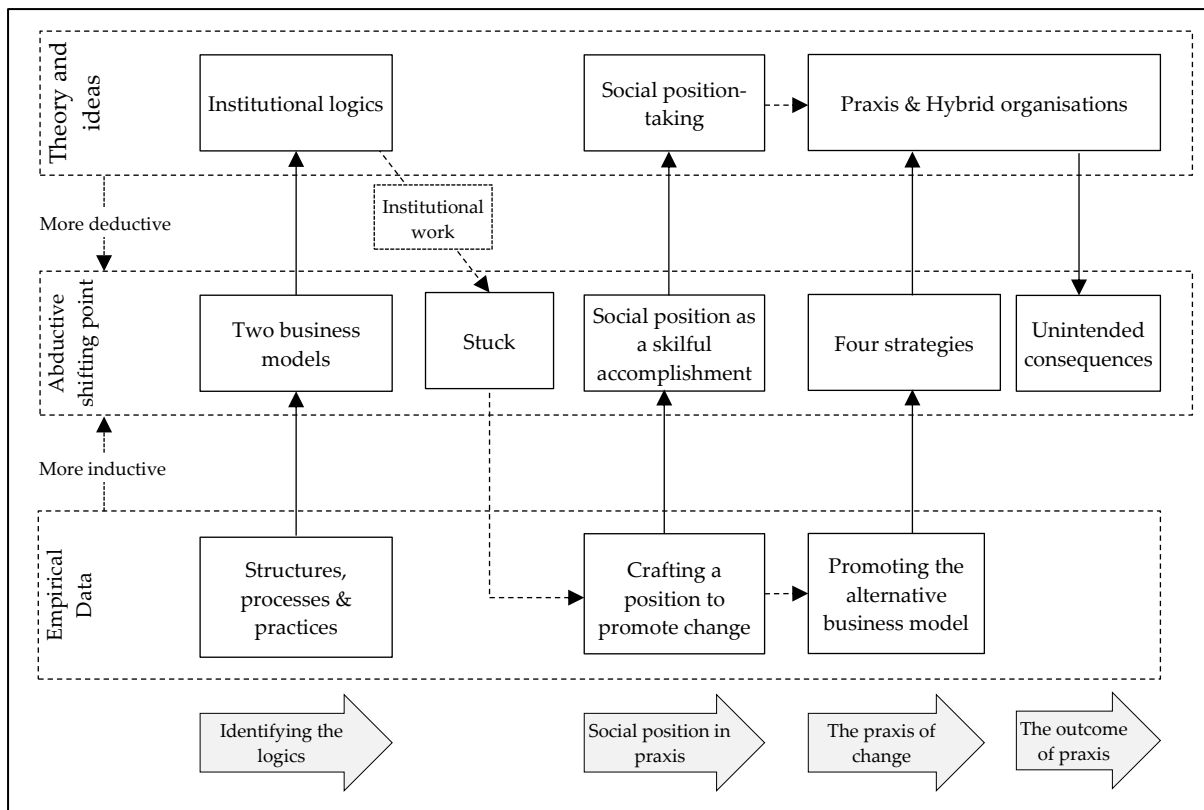


Figure 5.1: Stages of data analysis (overview)

Although the analytical stages illustrated in Figure 5.1 were interrelated and often occurred simultaneously, these steps broadly summarise how my insights developed. First, I familiarised myself with the data and identified two institutional logics at play (a dominant and an alternative one). I then more closely explored how the key informant skilfully crafted a position that enabled him to promote change. Based on that, I turned to the actual practical work involved in such efforts. It became increasingly evident that the actor's efforts did lead to outcomes that were different from those intended at the outset. The remainder of this chapter discusses these steps in more detail. In so doing, the subsequent sections also foreshadow the empirical findings and the theoretical contributions of this research. While this might seem unconventional, I believe that it also helps readers to understand the logical flow of arguments and the connections between analysis, findings and discussions (see Smets, Morris, & Greenwood, 2012 for a similar approach).

5.5.1 Identifying the two logics

As data collection progressed, I began to familiarise myself with the data in order to get an initial idea of "what is going on here?" (Wolcott, 1994, p. 12). As already noted, my research

interest at the outset of this study was to explore the emergence of a new practice area within the organisation. To establish “a detailed and elaborate description of the phenomenon” (Bleijenbergh, 2010, p. 61), I relied on more descriptive coding and coded contextual data to a separate node folder (Miles & Huberman, 1994; Richards, 2005). These included references to the broader engineering and engineering consulting field, the firm’s history, structure, practices and processes. I also created a separate node tree for the firm’s new management consulting division. Data in here referred to the specific history of this business unit, its perceived value proposition, the services delivered, and the way professionals portrayed themselves and the work they do. Throughout data collection it became evident that the establishment of the new division was part of broader efforts to promote what participants labelled “an alternative business model”. Thus, I extended the analysis to similarities and differences between the envisioned alternative and the current business model as informants described them. The institutional logics perspective (Thornton et al., 2012) emerged as best suited to describe the two world views at play. I referred back to existing literature on institutional logics and multi-disciplinary PSFs and coding became more deductive. This approach is similar to ‘pattern inducing’ described by Reay and Jones (2016) where logics emerge inductively from the data, followed by several iterations between extant theory and data.

In Chapter 6, I present the findings that emerged from this first step. It begins with a thick description of the organisational and institutional context in which the actor’s practical work is embedded. Chapter 6 then incorporates existent theory to differentiate the current and the alternative business model based on their “elemental categories or building blocks” (Thornton et al., 2012, p. 54) of institutional logics that have been identified by other scholars (see Table 3.2). The two identified logics, a dominant professional-engineering one and a hybrid engineering-advisory one, constitute the starting point for the subsequent chapters. Having established the two logics, I coded data according to the actual activities involved in promoting the alternative logic and disrupting the dominant. Initially, I replicated the institutional work framework (Lawrence & Suddaby, 2006) in a NVivo coding tree and (deductively) coded data to pre-existing categories. However, although most activities that scholarship identifies as institutional work were present, I increasingly felt stuck.

Apart from an extensive list of activities, I struggled to identify new insights that have not already been noted by existing scholarship. The categorisation of activities into disruptive, maintenance, or creational work appeared too restrictive because many observations did in fact fit with several categories. Thus, I resorted back to more inductive coding following two hunches I had constantly noted throughout data collection: Some of the empirical data reflected the diverse ways actors presented themselves in meetings and workshops, while other data denoted efforts to promote the alternative business model and to demonstrate shortcomings of the existing one. I coded the language used by the participants into two broadly defined pigeonholes labelled 'doing work' and 'social position'. Using those two "sensitizing concepts" (Barley, 1990, p. 220), I gradually moved to more abductive theorising by considering the data in tandem with existing theories (see Smets et al., 2015). Through several iterations between data and theory, the idea of social position-taking as a skilful accomplishment emerged to portray the actors self-representation as 'same but different'. Seo and Creed's (2002) notion of contradictions and praxis, and literature on hybrid organisations, appeared to be better suited to explain what I observed than the institutional work framework.

5.5.2 Focus on the actor's enabling position

As already mentioned, one thing that grabbed my attention is the way the key informant professional presented himself in daily interactions and more formal presentations. In some of those he demonstrated an in-depth understanding and appreciation of 'how we do things'. In other interactions, however, he positioned himself as distinctly different to most other professionals within the firm. This gave rise to portraying the actor's social position not in a static sense as the literature does (e.g., Battilana, 2006) but as a dynamic position-taking accomplished mindfully and creatively through certain practical action. To explore those, I first created descriptive nodes that were relatively close to the data (Creswell, 2007; Langley, 1999). Examples included 'demonstrating technical (engineering) skills', 'emphasising non-engineering interests' or 'stressing relevance of external knowledge for firm'. Through pattern matching and constant comparison (Miles & Huberman, 1994; Yin, 2003), I aggregated these thematic codes into three sets of activities, those of confirmative, bridging and segregating, that the institutional intrapreneur performed. Confirmative praxis refers to the enactment of formal and cultural capital that aligns with the dominant logic. Segregating praxis denotes the enactment of capital that is more closely related to the alternative logic. Finally, bridging

praxis draws on both logics and their complementarity. Through more rounds of iterations between data and theory I related those praxis with different social positions: committed regular (Unruh, 1980), hybridizer (Pache & Santos, 2013b), and dissident (Malsch & Gendron, 2013), that enabled the actor to introduce and promote the alternative logic, to demonstrate the shortcomings of the dominant one and to mobilise support.

5.5.3 Focus on the work of actors

After a mostly deductive approach, based institutional work framework (Lawrence & Suddaby, 2006) to analyse the practical work of actors, proved to be a cul-de-sac, I started anew and coded more descriptively. This was initially done based on the ends that describe the different actions. Increasingly, it emerged that some actions were rather rhetorical, in terms of creating some general awareness and skills to support the alternative business model and problematising the existing one. Others had more material elements such as gathering supporters or establishing a new performance-measurement system. Through considering these initial hunches in tandem with existing theories I aggregated those to different sets of tactics, and then further to four theoretical core concepts: 'Cognitive praxis' refers to hybridisation of knowledge (Noordegraaf, 2015) and attempts to increase the professionals awareness of market dynamics and alternative modes of organising (Greenwood & Suddaby, 2006). 'Sense-giving praxis' denotes purposeful attempts to emphasise contradictions and shortcomings of the current business model and the justification of the alternative one as normatively appropriate (Greenwood & Suddaby, 2006; Seo & Creed, 2002). 'Socio-political praxis' refers to empirical themes around creating unified support amongst actors through mentoring and organisational separation (Seo & Creed, 2002; Smets, Morris, & Greenwood, 2012). Finally, 'socio-material praxis' are coordinated attempts to substantially infuse the alternative logic into the daily work of professionals (Lawrence & Suddaby, 2006). However, the outcomes of these efforts warranted additional examination because they were neither entirely inconsequential nor as envisioned at the outset.

5.5.4 Focus on the consequences of praxis

The empirical puzzle that alerted my attention throughout the entire fieldwork was a lack of substantial consequences resulting from the actor's efforts. Although many activities observed were closely aligned with the ones suggested by the practice-based institutional scholarship,

they did not give rise to the envisioned hybrid organisation. In interviews, of course, professionals would constantly and uniformly emphasise the advantages of the envisioned one-stop-shop approach, their competitive advantage in contrast to non-engineering competitors (the Big Four), and the additional value clients would receive. Even the word 'engineering' was removed from the firm's homepage and their company logo to signal that they 'do more than just that'. However, practices, processes and structures predominantly reflected the 'old' business model and as such the dominant logic. There also seemed to be a strong separation between traditional and non-traditional services. After referring back to the literature, the distinction between blended and structural hybrids (Greenwood et al., 2011) emerged as an appropriate frame to explain the outcome of the actors praxis. Based on the notion of decoupling, I identified an 'assimilation of logics' when actors drew upon the alternative logic in their language but their practices remained steeped in the dominant one. Furthermore, the compartmentalisation of logics through the organisational separation of actors lead to an 'amplified separation' of logics, and increased the barriers to collaboration. Finally, on occasional instances, one could speak of a blended (integrated) hybrid that emerged when actors drew upon the alternative logic in their daily work and hybrid practice emerged. This required the close physical proximity and prolonged collaboration of actors who carried the two ideal-typical logics.

5.5.5 Summary of core concepts and empirical themes

Table 5.2 summarises the core concepts and empirical themes that resulted from the described analysis. The structure of the findings and discussion chapters is based essentially on this table and the four steps of analysis that are illustrated in Table 5.2.: (1) identifying the two logics, (2) an enabling social position in praxis, (2) the praxis of change and (4) the consequences of praxis. First, Chapter 6 introduces the dominant professional-engineering logic that reflects the firm's history but also its embeddedness in the engineering field. This logic is contrasted with the engineering-advisory logic that represents the envisioned "alternative business model" (as participants labelled it). Based on this, Chapter 7 addresses the research questions by presenting empirical data on: the practical work of actors to construct a social position that enabled them to challenge the firm's dominant organisational logic and to introduce and promote an alternative (RQ₁); the day-to-day praxis involved in such efforts (RQ₂); and the

consequences thereof (RQ₃). Then, Chapter 8 discusses the core concepts introduced in the first column of Table 5.2 in relation to existing theory.

Core concepts	Empirical themes	Purpose and data source	
<i>Identifying the two logics</i>			
The professional-engineering logic	Emphasis on doing (technical excellent) engineering work; producing tangible outcomes	Thick description of institutional and organisational context to establish the two logics (Chapter 6). Mainly based on initial interviews and archival data.	
The engineering-advisory logic	Emphasis on integrating engineering and non-engineering expertise for commercial ends		
<i>An enabling position in praxis</i>			
The committed regular	Enacting dominant logic through confirmative praxis; based on understanding how 'we do things around here'	Thick description of strategies used by actors to position himself as same but different (Chapter 7.2). Mainly based on observations of key actor and subsequent discussions.	
The dissident	Enacting alternative logic through segregating praxis; based on distinctiveness to other actors		
The hybridizer	Bridging logics based on complementary of skills and knowledge		
<i>The praxis of change</i>			
Cognitive praxis	Sensitizing to field level dynamics Theorizing the key elements of the alternative business model Educating actors in the relevant skills (e.g., commercial acumen)	Thick description of strategies and tactics used by actors to promote alternative business model and to demonstrate shortcomings of existing one (Chapter 7.3). Based on observations of multiple actors and follow-up interviews.	
Sense-giving praxis	Framing the alignment of field-level changes with alternative ideas Problematizing existing practices and exposing inherent contradictions Aligning identifies through evoking collective ends		
Socio-political praxis	Mobilizing: Recruiting, empowering and demonstrating support for alternative business model Clustering: Assembling actors to create unified support		
Socio-material praxis	Routinisation: Adjusting organisational processes Integrative embedding: of actors who draw on either logic		
<i>The consequences of praxis</i>			
Assimilation	Alternative business model is rhetorically and symbolically but practices remain unchanged.		Description to what extend the elements of the alternative logic are actually represented in the daily work of professionals (Chapter 7.4). Based on observations and follow-up interviews.
Amplified separation	Actors are organisationally separated (structural hybrid) and develop a sense of distinctiveness		
Integration	(Blended) hybrid practices emerged in isolated instances through infusion of alternative logic in substantive ways.		

Table 5.2: Summary of core concepts and empirical themes

5.6. Research evaluation

Utilising established (positivist) criteria to evaluate the soundness of research that draws on an interpretivist paradigm is inherently difficult given the lack of an 'objective' reality and the subjective nature of knowledge (Creswell, 2007). In a series of publications, Lincoln and Guba (e.g., Guba, 1981; Guba & Lincoln, 1982; Lincoln & Guba, 1985, 2000) highlight the importance of establishing the trustworthiness of a qualitative enquiry. To demonstrate trustworthiness, these authors propose to replace traditional positivist criteria: internal validity, external validity, reliability, and objectivity, with four analogous terms: credibility, transferability, reliability, and confirmability—to evaluate the soundness of qualitative research. The remainder of this chapter discusses each one in turn and elaborates the strategies that were adopted to ensure that the reader of my thesis “believes what is said there” (Lincoln & Guba, 1985, p. 11).

Credibility replaces the positivist criteria of internal validity that rests on relationships between independent and dependent variables that are causal and not merely spurious (Lincoln & Guba, 1985). However, the epistemological and ontological assumptions that underpin this research point to the existence of multiple social realities that are fundamentally subjective in nature. Given the lack of an objective reality in interpretivist research, the key question thus becomes to what extent a subjective reality has been appropriately represented according to its constructors (Guba & Lincoln, 1982). Strategies to ensure the credibility of qualitative research are sustained engagement and persistent observations to develop an in-depth understanding of the research site (Guba & Lincoln, 1982). A prolonged engagement can also build trust and safeguard against responses and behaviour that is distorted because of the presence of the researcher (Fontana & Frey, 2000; Lincoln & Guba, 1985). Thus, the significant amount of time I spent at the research site has enabled me to gain insights that interviews by themselves would not have given me. For example, the main informant mentioned in one conversation that “you know more about the firm than 90 per cent of our staff”.

This also points to the danger of ‘going native’ (Geertz, 1973) that emerges through a prolonged engagement with participants (Lincoln & Guba, 1985). I became increasingly aware that I tended to use ‘we’ when talking about the firm after a couple of weeks. I therefore

consciously tried to maintain a certain degree of objectivity and scepticism in terms of not taking the informant's view for granted, and continuously self-reflected on my role as a researcher (Gioia et al., 2012; Tedlock, 1991; Yanow, 2009). Also, I do not claim that my prolonged time spent at the firm means that my presence had no impact at all on the behaviour of participants. However, apart from participants getting accustomed to being observed and recorded, I would argue that the setting as such minimised the potential distortion of behaviour and interview responses. As suggested by the literature on PSFs, the relationship between members in such firms is mostly characterised as being 'peers'. Professionals were usually not overly concerned about any repercussions that might emerge from their remarks or actions. Indeed, also low-level professionals were surprisingly eager to discuss and critique the firm's management.

Another mode of improving the credibility of interpretivist research is the technique of triangulation (Lincoln & Guba, 1985). Building on Denzin (1978), the findings of this study draw on multiple sources of data, and three main methods of data collection, in order to establish a variety of perspectives (Creswell, 2007; Lincoln & Guba, 1985). I would discuss insights into organisational practices obtained from observations with professionals on different levels in the firm's hierarchy and also consult documentary evidence referring to those (Yin, 2003). Finally, I conducted continuous "member checks" with informants to discuss observations and emerging interpretations. Lincoln and Guba (1985, p. 314) consider these to be "the most crucial technique for establishing credibility". Although any findings reported are ultimately my interpretation of events, participants should nevertheless acknowledge them as an adequate representation of their subjective realities (Lincoln & Guba, 1985; Merriam & Tisdell, 2016). To conduct member checks, I scheduled follow up interviews with respondents where I ask participants to comment on observations made and conclusions drawn (Creswell, 2007). Those interactions also helped me to refine ideas, reduce my own biases and avoid misinterpretations of the meaning of the observed events (Maxwell, 2013). In the chapters covering findings, data from member checks are usually included as direct quotations from interviews in addition to observational data.

Besides credibility, Lincoln and Guba (1985) suggest to establish the transferability of findings in reference to the more positivist notion of external validity. External validity is typically ensured through random samples that are drawn based on probability techniques

(Babbie, 2014). However, the justification of the case as a 'talking pig' (Siggelkow, 2007) is detrimental to the notion of random sampling. As argued throughout this thesis, I deliberately identified a non-representative sample that maximises the potential for theoretical insights. The value of the selected case thus essentially rests on a lack of external validity (Maxwell, 2013). In line with Guba and Lincoln's (1982) suggestion to draw on theoretical and purposive sampling in order to establish transferability, sampling decisions are grounded in pre-existing theories that guided decisions of "where to go [and] what to look for" (C. Marshall & Rossman, 2016, p. 74). Those sampling choices were already justified in section 5.3.3. Transferability rests on thick descriptions of the phenomenon under study (Geertz, 1973; Lincoln & Guba, 1985) so readers can assess to what extent the findings are transferable to their own situation (Merriam & Tisdell, 2016). Because any observations are meaningful only in the wider context, this also refers to a depth of contextual details on multiple levels (Langley & Abdallah, 2011). The findings presented in the subsequent chapter therefore continuously relate the individual activities observed, the artefacts used or the language employed to their wider organisational and institutional context (Creswell, 2007).

Dependability, Lincoln and Guba's third cornerstone of trustworthiness, is suggested as analogous to the positivist criteria of replicability. In essence, replicability denotes that different investigators should be able to repeat a study under the same circumstances and still arrive at the same conclusions (Guba & Lincoln, 1982). However, the constantly evolving and social constructed nature of reality in interpretivist research renders any replicability claims problematic because conclusions are inherently dependent on the investigators interpretations of events and the specific (temporal) context of occurrence (C. Marshall & Rossman, 2016; Shenton, 2004). Dependability can be enhanced through keeping detailed records of the data collected and thorough documentation of any decisions made that are relevant to the final conclusions (Lincoln & Guba, 1985; C. Marshall & Rossman, 2016). To ensure dependability, I have organised and documented all data collected, safeguarded any records against loss in a cloud drive, kept logs that document all phases of the research process and frequently created backups of the NVivo file so the emerging coding structure is demonstrable (Bryman, 2015). Although Lincoln and Guba (1985) also suggest external audits to demonstrate dependability this strategy is (for pragmatic reasons) rarely used in practice. The dependability of my study relies mainly on Lincoln and Guba's (1985, pp. 316–317)

remark that dependability logically emerges from the demonstrated credibility because findings that accurately represent a subjective reality are naturally dependable.

Finally, confirmability refers to the difficulty (or impossibility) of claiming objectivity in interpretivist inquiries (Lincoln & Guba, 1985). In positivist research, objectivity can be established through minimising the interactions between researcher and participants. However, the “deep immersion in the field” (Jarzabkowski et al., 2014, p. 276) that characterises ethnographic fieldwork accentuates the close relationship between informants and researchers who both co-produce knowledge. Thus, confirmability requires the researcher to reflect on and explicate how pre-existing assumptions, expectations, biases, values or perceptual lenses may have influenced the conduct of the research and the conclusions that emerged (Maxwell, 2013). This is done not only by discussing the philosophical paradigms that underpin this research (see section 5.2) and the description of how the theoretical framework and findings emerged. Confirmability also shifts the onus of establishing objectivity from the inquirer to the data itself (Guba & Lincoln, 1982). The researcher needs to demonstrate that findings are not merely incidental or entire subjective but grounded in data and analytical processes that were carried out according to good practice (Bryman, 2015).

This does not indicate that other researchers need to come to the same conclusions that are presented in a study. The researcher needs to establish some logical connection between theoretical background, philosophical assumptions, and empirical data, to demonstrate that conclusions are warranted and reasonable in the light of the empirical evidence (C. Marshall & Rossman, 2016). Jarzabkowski and colleagues (2014) suggest that this is done by vivid portrayals of events, conversations or practices, and verbatim quotes, that illuminate the theoretical constructs an author wishes to convey. As foreshadowed in the previous sections, the findings chapters are structured around core concepts that will be discussed in more theoretical terms in the final chapter of this thesis. The findings chapters also weave together observations, interview data, artefacts and archival data to zoom in on the actual micro-dynamics of individual praxis, also relating them to the broader organisational and institutional practices (Jarzabkowski et al., 2014).

5.7. Chapter summary

This chapter opened with the justification of an interpretivist research paradigm as naturally suited to develop an understanding of individual praxis and the subjective meaning ascribed to it. It then outlined why conducting an ethnographically informed case study of an engineering firm's attempt to diversify into non-traditional (management consulting) services was judged as especially suitable to address the research questions that fundamentally evolve around individual actors who are doing work in an institutionalised context. Logically, this pointed to longitudinal observations of actors in their organisational setting as the main method of data collection. Given the embedded nature of institutional logics, however, this also necessitated the collection of data on multiple levels to develop the in-depth understanding that is presented in the subsequent findings chapters. Table 5.3 summarises the different elements of the research design and justifies each one.

	Adopted approach	Justification
<i>Research philosophy</i>		
Ontology	Constructivist: Rejects the existence of a reality that is external to people.	Institutions are not 'out-there' but produced and reproduced in social interactions.
Epistemology	Interpretivist: Knowledge claims are interpretation based and subjective	Research questions emphasise an in-depth understanding of actors and the situated meanings they ascribe to their actions
<i>Research Strategy</i>		
Unit and level of analysis	Main unit of analysis are individual practitioners, level of analysis is the micro level praxis of embedded actors	Identified gap and research questions point to individuals and their practical work (praxis). However, any individual praxis is embedded in multiple levels that need to be considered.
Study design	Single, embedded, longitudinal, ethnographic case study	The phenomena under study is intrinsically interesting and complex. An ethnographic and longitudinal design enables a prolonged immersion in the field and a focus on social actions as they develop over time. An embedded design captures the interplay of activities in their organisational and institutional context.
Case selection	Purposeful sampling: Engineering consulting firm that diversifies into non-traditional service areas	Engineering is typically portrayed as a highly institutionalised field; Management consulting has introduced a commercial-market logic to the accounting firms. Studied actors play a key role in promote alternative services
<i>Methods of data collection</i>		
Main data source	Observing actors in their natural setting	Focus on 'doing' work and habitus stipulates observation techniques.
Secondary data sources	Semi-structured interviews and archival data	Interviews to elicit further information, verify interpretations and discuss initial findings. Archival data to increase contextual understanding and to account for embeddedness of individuals.
<i>Research evaluation</i>		
Credibility	Prolonged engagement, persistent observations, triangulation, member checks	Assures that the findings accurately reflect the participants' reality and not my own biases.
Transferability	Thick description of observations and context, purposeful sampling based on established criteria,	Assures that others can assess to what extend the findings are transferable to their situation. Contextual information establishes that findings are not solely site specific but reflect practices of the broader field.
Reliability	Records of data collected and systematic research process	Describing the research process in depth and rationalising the steps taken demonstrates how the conclusions were derived.
Confirmability	Thick description and verbatim quotes, self-reflection, acknowledging biases and paradigms	Demonstrate that findings are not merely incidental or entire subjective but reasonable grounded in data and analytical processes that were carried out according to good practice.

Table 5.3: Summary of research design

CHAPTER 6: Findings I—Engineering Consulting in Flux

6.1. Aim of the chapter

This is the first of two findings chapters. Their purpose is to provide a ‘thick case description’ (Geertz, 1973) in order to make the empirical data visible to the reader and let participants and observations “speak for themselves” (Starbuck, 1993, p. 887). Grounded in the fundamental notion of a reciprocal relationship between institutional logics and micro level action (Barley & Tolbert, 1997; Seo & Creed, 2002), the findings of this study are divided into two separate chapters. To facilitate “context-sensitive theorizing” (Zilber, 2016a, p. 147), this chapter introduces the institutional and organisational setting in which the micro level action is embedded; the historic development and significant characteristics of the broader organisational fields of consulting engineering and management consulting are outlined. The case organisation, Corgan Ltd., is then introduced to elaborate how organisational practices and individual identities reflect both the dominant logic of the consulting engineering fields and the firm’s specific culture and history. Finally, this chapter shows how the firm’s attempts to diversify into service areas considered as non-traditional engineering services (essentially management consulting) have resulted in, and indeed necessitates, the emergence of an alternative institutional logic that challenged some fundamental elements of the dominant one. The first findings chapter ends with contrasting the two logics at play: a professional-engineering logic and an alternative hybrid engineering-advisory logic that combines elements from the prevailing logic with a more commercial-market orientation. Based on this, the second findings chapter seeks to answer the research questions by exploring the actual praxis of individuals in promoting alternative logics, the mundane practices that maintain the dominant logic, and the (often unintended) consequences of these micro level activities.

6.2. Engineering and consulting engineering

Lawrence and Suddaby (2006, p. 248) argue that the nested view of institutional works means that researchers cannot understand a particular logic “without exploring and gaining insight into the logics of the social fields that surround it.” Accordingly, this section outlines the history, significant characteristics and dynamics, that characterise the field of engineering and engineering consulting. Engineering consulting is contrasted briefly with management consulting because existing literature argues that diversification into management consulting

services has infused into accounting firms distinctive elements of a commercial-market logic (such as profit maximisation, client satisfaction or pro-active marketing and selling of professional services).

6.2.1 A brief background on (consulting) engineering

The etymological roots of the word 'engineer' or 'engineering' as used today can be found in early Roman times where the Latin expression '*ingenium*' was used to describe an ingenious physical object or person (Harms, Baetz, & Volti, 2004). As a description of an occupational group, the term engineer can be traced to the French word *engigneour* that originally referred to a "person who designs and constructs military works for attack and defence" (Oxford English Dictionary). Historically, engineers engaged primarily in public sector work such as roads or dockyards to facilitate the military logistics. In the 18th century, however, civil engineering emerged as a separate discipline to "distinguish engineering work performed for the public good from that of a purely military nature" (Pannell, 1964, p. 11). Civil engineering is thus concerned with the design, construction and maintenance of structural elements such as roads, bridges, canals or dams for non-military purposes (Carr-Saunders & Wilson, 1964).

As with civil engineering, other sub-disciplines developed in conjunction with social, political and economic changes. The rise of modern industrial production and steam engines in the course of the Industrial Revolution facilitated the emergence of mechanical and industrial engineering (Johnston, Gostelow, & King, 2000; Larson, 1977). While industrial engineers are concerned with "the design, improvement and installation of integrated systems of people, materials, and energy in the production of either goods or services" (P. H. Wright, 1994, p. 30), mechanical engineers primarily design, manufacture or maintain machinery and equipment for industrial production. Chemical engineering as "an intermediate discipline lying between chemistry and mechanical engineering" (Perkins, 2003, p. 20) emerged from an increasing demand for the large-scale manufacturing of gasoline, explosives, drugs, poisons, soaps or dyes that was fuelled partially by two world wars (Garrison, 1999). Finally, electrical engineering has its origin in scientific discoveries such as electromagnetism by Michael Faraday and inventions such as electrical lighting by Thomas Edison that in turn required the effective production, transmission and use of electrical power (Garrison, 1999). The categorisation of engineering work into branches such as civil, industrial, mechanical, chemical and electrical

(as the key ones) illustrates the importance of the “physical phenomena” (Harms et al., 2004, p. 217) concerned, the output produced and the technical problems to be solved by the professional (Abbott, 1988).

In the course of time, engineering training and education became more formalised and “well grounded in theoretical science and mathematics” (Lefsrud & Suddaby, 2012, p. 331). The first professional engineering schools were established in France with the *École Nationale des Ponts et Chaussées* (“National School of Bridges and Highways”) in 1747, followed by *Ecole Polytechnique* in 1794 (Johnston et al., 2000). In Britain, the first university schools of engineering had to wait until 1838 (Wood, 2004). The departure from an artisan notion of engineering based on practical apprenticeship and “mere empiricism” (Downey & Lucena, 2004, p. 408), towards institutionalised training and education, in combination with the construction of a shared technical and scientific knowledge base, can be seen as the beginning of an emergent engineering profession (Armytage, 1976; Harms et al., 2004; Larson, 1977). At the same time as engineering education became more formalised, interest groups and professional associations such as the Society of Civil Engineers (1771), the Institution of Civil Engineers (founded 1818) and the Institution of Mechanical Engineers (1847) were established in Great Britain. The second half of the nineteenth century also saw an increased separation between design and construction of permanent structures (Wood, 2004). For instance, Durbin (1991, p. 68) argues that the “the thing that separates the inner core of professional engineers from other technical workers is the ability to design”. By focusing on design and other non-construction related work, engineers came to assume the characteristics of contemporary consulting engineers who do the design work, engage contractors for the construction and then supervise the construction (Wood, 2004).

While engineering is often mentioned as one of the prototypical professions (von Nordenflycht, 2010), others question the professional status of engineering, since the profession lacks power, autonomy and the monopolistic control to provide particular services (see Barley, 2006). Scholars claim that engineering has “a woeful record of united action” (Halliday, 1985, p. 437), historically fragmented into several branches, each one represented by a separate association with very loose co-ordination between each of them. For instance, in North America alone, around 200 engineering societies or related groups exist (P. H. Wright, 1994). Throughout the profession’s entire history, engineers remained furthermore

“subordinate to the direction of their clients [or employers]” (Barley, 2006, p. 380) because they had been working for large organisations or relied on large sums of capital from private and public clients (Larson, 1977; Malhotra & Morris, 2009).

While many engineers take up roles in non-engineering industries, this research is especially interested in those working in the engineering and construction industry and in particular in engineering consulting and design firms. The engineering and construction sector (especially in countries with historical ties to Great Britain, like New Zealand, can be sub-divided into three types of firms that are involved in most large projects: (1) architectural, engineering consulting and design firms (in the following engineering consultancies), (2) construction contractors, and (3) construction material providers (Baark, 2004; Løwendahl, 2005). Engineering consultancies can be defined as knowledge based organisations that provide “clients with advanced engineering design or technical supervision services” (Baark, 2004, p. 68). The focus on design and supervision is indicative of the historically developed distinction between engineering consultancies and construction companies. Statistics New Zealand (2006) defines Engineering Design and Consulting as activities by individuals or organisations who are:

primarily involved in applying physical laws and principles of engineering in the design, development and utilisation of machines, materials, instruments, structures, processes and systems. Units provide advice, prepare feasibility studies, prepare preliminary and final plans and designs, provide technical services during the construction or installation phase, inspect and evaluate engineering projects.

Engineering consultancies are generally project-based organisations, often working on large-scale, highly complex projects for governmental clients (Løwendahl, 2005; Muzio, Hodgson, Faulconbridge, Beaverstock, & Hall, 2011). According to Winch and Schneider (1993) they “articulate their distinctive competence around *technology*...[to] provide solutions to their clients technical problems” (p. 925, emphasis in original). Individual and organisational knowledge and expertise (so-called track record) constitutes one key element of an engineering consulting firm’s competitive advantage (Malhotra, 2003). Leadership positions in engineering consulting firms are (at least historically) held by “predominantly technically

and creatively distinguished engineers” (Fenton & Pettigrew, 2006, p. 130). To secure new projects, firms typically engage in a process of competitive bidding (Løwendahl, 2005). Particularly, in the case of governmental work, clients issue a publicly available formal request for proposal (RFP) that outlines the nature of the project and the required scope of services. In response, the engineering consulting firm ‘writes a bid’ (a proposal) that includes the company’s history, successfully-delivered similar projects, the background of individuals who will be working on the project, and the proposed billing arrangement (Walesh, 2012). Depending on the complexity and risk involved in the project, several methods for calculating the cost for engineering consulting services exist (see Carr & Beyor, 2005). The most common ones, including for the engineering consulting firm studied for this thesis, are an hourly plus expense rate with a not to exceed total cost cap and a fixed (lump-sum) fee for all work up front (Farr, 2001; Malhotra, 2003).

The larger engineering consulting firms are, typically, publicly or privately held corporations that have adopted multi-disciplinary organisational forms (Malhotra & Morris, 2009). In the course of time, engineering consultancies have acquired or developed architectural practices to expand their service range (Winch & Schneider, 1993). Although most large firms label themselves as ‘multi-disciplinary consultancies’ because they offer related services such as surveying or project management, Boxall and Steeneveld (1999, p. 447) point out that “engineering disciplines form the fundamental base” of those companies. Structurally, engineering consultancies usually operate on a divisional basis, with the separate divisions (practice areas) representing the diverse branches of engineering. In their study of a structural-engineering consulting firm, Oakland and Aldridge (1995, p. 37) describe a strong “divisional identity [...] based on engineering and work disciplines such as civil, structures and motorway maintenance.”

Similar to other professional sectors such as law and accounting, engineering consulting firms frequently employ a performance-measure labelled billable-hours or utilisation rate to measure individual, divisional and organisational performance (Eugenio, 2005; Løwendahl, 2005; Norris, 1990). Doing engineering consulting work involves connecting “different pieces of engineering expertise meticulously to arrive at a technically feasible solution for the client” (Malhotra & Morris, 2009, p. 904). To achieve this, engineers can rely on universal formulas and well understood processes (Barley, 2006; Collins, 1979; Halliday,

1985). While a degree of customization to client requirements and contextual conditions is necessary in doing engineering design work (Malhotra, 2003), “a typical project involves a number of clearly defined procedures” (Fosstenløykken et al., 2003, p. 865). For that reason, large engineering firms usually engage in procedure-type projects that are characterised by high fee pressures, and standardised systems and processes, to handle specific problem types (Fosstenløykken, 2007; Maister, 2003). Engineering consulting services typically “result in drawings, calculations and plans, which are tangible, storable, and reusable” (Løwendahl, 2005, p. 15). Emphasising the importance of the tangible and practical aspects in a similar way, the International Federation of Consulting Engineers (FIDIC) defines engineering as a profession that “combines the fields of science and maths to solve real world problems that improve the world around us” (FIDIC, n.d.). The important role of substantial aspects in engineering work is also reflected in accounts claiming that the identity of engineers is based on the “technical ability” (Hatmaker, 2013, p. 384) to solve complex “real-world problems” (Hayden, 2007, p. 118) for “themselves, for their team, for their organization, and for their client” (Anderson, Courter, McGlamery, Nathans-Kelly, & Nicometo, 2010, p. 170). In contrast, commercial outcomes of the projects delivered often come second as Løwendahl (2005) reflects:

When I asked the professionals participating in my dissertation study, surprisingly many of them (including co-owners and managers) replied that their primary goal was to help clients and have fun, rather than to make profits. This was particularly true of the engineers in the engineering design firms. (p. 49)

6.2.2 Engineering consulting compared to management consulting

The origins of contemporary management consulting can be found in industrial engineering and the emergence and diffusion of scientific management, known as Taylorism, after the First World War (Engwall & Kipping, 2013). Kipping (1997, p. 69) argues that “French engineers showed an early interest in Taylorism, because of its 'scientific' character”. However, while Taylor predominantly distributed his concepts through lectures and publications (an exception is his work at Bethlehem Steel where the famous pig-iron handling experiment originated), others under various labels such as ‘management engineers’, ‘consulting

engineers' (as Taylor called himself) or 'efficiency engineers' began to advise organisations on the implementation of Taylor's concept (Hough & White, 2001; C. Wright & Kipping, 2012). According to Henry (2002, p. 26), those consulting engineers saw it as their "duty [...] to introduce 'science' to management methods". The primary route into a management consulting career was historically through an engineering degree (T. Clark & McKenna, 2007; Muzio, Kirkpatrick, & Kipping, 2011). However, these consulting engineers worked predominantly on an individual basis or in small groups and offered ad-hoc advice without setting up lasting consulting firms (Nelson, 1980; C. Wright & Kipping, 2012). Only after the Great Depression in the 1930s firms did grow beyond their founders (McKenna, 1995).

Non-engineers and individuals trained in multiple professions began increasingly to advise organizations on operational techniques and shop floor design (Engwall & Kipping, 2013). For instance, James McKinsey put 'accountant and engineer' on his letterhead when he established one of the best known management consulting firms (McKinsey) in 1927 (McKenna, 1995). From the 1930s onwards, consulting companies began to no longer advise on solely technical matters but increasingly "on wider organizational and strategic issues" (Kipping, 1999, p. 207). The 1960s saw the emergence of a new player in the management consulting field as the large accounting firms began to expand their 'business-advisory' capabilities. Prompted by the rise of technology and the resulting standardisation of audit and accounting services, those firms merged with non-accounting firms, adopting multi-disciplinary organisational forms to offer management consulting services "in order to 'add value' to audit services" (McDougald & Greenwood, 2012, p. 111). Building on their existing client relationships, strong reputation, and the accounting profession's "aura of respectability, seriousness, and professionalism", the accounting firms (now the Big Four) were able "to become the world leaders in management consulting services" (Saint-Martin, 2007, p. 681) in the following decades. While the accounting firms initially focused on rather standardised and procedural services to improve organisational efficiency and effectiveness (and the implementation of IT systems), they offered advice on organisational restructuring and strategy and began to compete directly with management consulting firms (Hansen, Nohria, & Tierney, 1999; McDougald & Greenwood, 2012).

From their earliest days, management consultants engaged in a project of professionalisation by trying to set up credentials and professional associations "in their

efforts to market a new and poorly understood service” (McKenna, 1995, p. 53). While the engineering profession’s degree of occupational closure is debatable, management consulting was not able to establish any kind of notable jurisdictional control in the traditional sense (Groß & Kieser, 2006). There are thus no dominant professional associations controlling the right to practice consulting or mandatory certifications and qualification pathways (Muzio, Kirkpatrick, et al., 2011; von Nordenflycht et al., 2015). Management consulting firms tend to recruit professionals from a variety of backgrounds and train them in-house (Fosstenløyken et al., 2003). Due to their lack of status as a profession in the classical sense, management consulting firms had to adopt strategies that Reed (1996, p. 586) terms “marketization” to sell their services and to convince clients of their expertise and trustworthiness. Kipping (1999, p. 192) argues that: “the decision to hire a consultant relies almost exclusively on the reputation of the service provider and the establishment of a trust-based relationship between consultant and client.”

While engineering consultancies compete predominantly on the basis of existing technical knowledge, and the estimated price for their services in a process of competitive bidding, management consulting firms rely much more on pro-active approaches to build their brand and reputation to secure new projects. They invest heavily in “aggressively marketing” (Reed, 1996, p. 585) and on other promotional activities such as direct advertising of leadership positions or recruitment events at business schools (Groß & Kieser, 2006). Consulting firms internally emphasise a strong corporate culture, standardised vocabulary, and even dress codes, to differentiate themselves from competitors (T. Clark & McKenna, 2007; Engwall & Kipping, 2013). Because of the importance of pro-active selling of management consulting services, higher-level employees are expected to build and maintain strong networks with clients in order to generate new business (Glückler & Armbrüster, 2003; Spence & Carter, 2014). Arguing along the same lines, Wyatt (2004) claims that the diversification of accounting firms into management consulting has led to a de-emphasis on technical skills. Promotional criteria in turn increasingly emphasised “keeping the client happy [and] cross-selling a range of consulting services to audit clients became one of the important criteria in the evaluation of audit partners” (p. 50). Although engineering is often described as a scientific profession that is “concerned with matter of fact” (Malhotra & Morris, 2009, p. 899; Halliday, 1985), management consulting knowledge is often labelled as “elusive,

fuzzy and perishable” (Muzio, Kirkpatrick, et al., 2011, p. 805) or “esoteric” (Reed, 1996, p. 585).

The status of management consulting firms is not based on any regulatory privilege, or a claim to serve the general public, but rather on the presumed “commercial value-added” (Muzio, Hodgson, et al., 2011, p. 455) delivered to client organisations. A more critical view on management consulting work questions those benefits delivered by management consulting firms, as they are supposedly based primarily on trends and fashions that “have little to do with science or validated practice”, and thus rely on “novelty, exaggeration, persuasiveness, crude commercialism and grand claims” (Alvesson & Johansson, 2002, p. 239). In that stream of literature, the success of management consultancy firms is attributed mainly to their impression management and rhetorical strategies to legitimise their approaches as rational and consistent with normative myths (Berglund & Werr, 2000). Others caution against this depiction of clients as “somehow retarded victims” (Armbrüster, 2006a, p. 6) of opportunistic “pseudo-professional” (Svensson, 2006, p. 364) management consultants who trade on empty rhetoric and expertise that is “flawed, fashionable, glib, and as at odds with expert, scientific academic knowledge” (Salaman, 2002, p. 250). Yet, a degree of scepticism towards the management consulting ‘profession’ is apparent in academic scholarship (e.g., March, 1991; Sorge & van Witteloostuijn, 2004) as well as in the practitioner literature (e.g., O’Shea & Madigan, 1998).

While engineering firms primarily operate on a project-by-project basis, usually having to bid for each project anew, consulting firms often rely on ongoing engagements that secure a constant flow of work (McDougald & Greenwood, 2012). Management consulting projects tend to be shorter than engineering projects, but are often characterised by higher profit margins and an ongoing flow of revenue from clients. Furthermore, in contrast to engineers who are usually portrayed as “devisers of physical objects” (Larson, 1977, p. 26) management consultants provide more intangible forms of advice whose quality cannot easily be assessed, even after a project has finished (Armbrüster, 2006a). Collins (1979, p. 175) refers to differences between lawyers and engineers and states that “the one produces real outcomes; the other tends to manipulate appearances and beliefs.” Finally, engineering consultancies interact most intensely with their clients in the early stages of a project, whereas once “the project proposal has been accepted, the design process takes place largely within the

engineering firm" (Løwendahl, 2005, p. 38). Management consulting, in contrast, involves a more ongoing interaction with clients as solutions are co-produced and problems or expected results are less well defined (Nikolova, 2012). Along the same lines, Sandberg and Werr (2003) portray the role of management consultants as 'generalists' who draw on a holistic understanding of the client's business and strategy while 'technical specialists' need to understand a client's systems, the initial project requirements and possible boundary conditions.

6.2.3 Dynamics in the engineering market

The literature on innovation and change in professional services identifies technological developments, consolidation, globalisation and emerging client demands as the main reasons why PSFs develop new services and adopt more corporate forms of organising (Brock et al., 1999; Greenwood et al., 2002). Although those studies refer mostly to law and accounting firms, the same pressures are apparent in the engineering consulting market.

Technological advances have enabled engineering design firms to automate processes and to outsource or offshore standardised services to lower cost countries. Increased use of 3D design software, building information modelling or modular design have made it possible to automate much of the work of design and engineering (PWC, 2016). The use of big data, artificial intelligence or simulation software is said to increasingly replace individual expertise and to "disrupt the very notion of a professional engineer" (Kanga, 2016, para. 2). Improved availability and speed of Internet connections, together with the emergence of Cloud computing solutions, have made it easier to offshore engineering design work to low-cost design centres, or to outsource to third party providers (Bryant, 2006). The types of work typically offshored or outsourced are of a standardised nature and include the transformation of sketches to 2D or 3D CAD models (National Academy of Engineering, 2008). Second, consolidation in the engineering sector has increased competition, with some large engineering consultancies beginning "to mimic the likes of accountancy's Big Four firms" (Wynne, 2014, para. 1) in terms of international reach and an integrated service range. The \$US6 billion acquisition of US engineering construction group URS by the global engineering and design group AECOM in 2014 is said to "radically reshape the industry" (Briance, 2014, para. 1). For all these reasons, Farr argued in 2001 that

[...] engineering firms are transitioning from a service to a commodities-based profession. The advent of computer software, outsourcing design to offshore design firms, consolidation in the industry, and market penetration in the more lucrative aspect of civil engineering [...] are just some of the key reasons for this shift in the industry. (p. 226)

Observers of the professions argue that it is “entirely possible the Big 4 and their emulators will diversify even further in their quest for growth and portfolio benefits—perhaps into aspects of consulting engineering” (Beaton, 2012, para. 6). Russell (2003, p. 395) speaks of an “increasing intrusion into the world of design and construction by accounting, financial, and management consulting”. The engineering profession faces new entrants such as large management consulting firms who are looking to extend their advisory capabilities with more technically led services. In 2013, Deloitte Australia formed ‘a strategic advisory alliance’ with WorleyParsons, one of the world’s largest engineering consulting firms (Ramsey, 2013). Clients have come to expect engineers to “demonstrate the cost-effectiveness of their designs” (Leicht & Fennell, 1997, p. 219) and to provide a “complete solution” in terms of a “more complex, end-to-end package of activities” (Dougherty, 2004, p. 36). Other scholars argue that clients “no longer seek purely technical solutions from structural engineers but are seeking to appoint business consultants who can provide expert advice across a range of multidisciplinary challenges that they face” (Storey, 2016, p. 128). Aside from internationalisation of engineering consulting firms in pursuit of additional revenues, firms have responded to market pressures and client demands by seeking “high-end business in everything from program management to information technology consulting” (Russell, 2003, p. 395). Other scholars note that engineering firms “tend to move into management consulting” (Aharoni, 2000a, p. 18) and “related areas such as risk management and health and safety consulting that also lie outside the boundaries of the engineering profession” (Malhotra & Morris, 2009, p. 910). A more recent example is the global engineering design firm AURECON that hired a former Deloitte CEO as its new Chief Executive “to grow the company even further around and beyond its excellent core design and engineering business” (“AURECON appoints new CEO,” 2014). Scholarly attention to those attempts is, however, largely missing. Fosstenløyken’s dissertation (2007), for instance, studied an engineering design firm but explicitly excluded the firm’s management consulting division because the

services provided are “very different from those of engineering” (p. 84), without elaborating on why this is so.

6.3. Introducing Corgan

This section moves from the general description of the organisational field to the chosen research site of Corgan Ltd. (the organisation-as-field). While the previous section was based largely on a reading of scholarly and practitioner literature on engineering and engineering consultancies, this section draws on data obtained from the field-work. The aim of these sections is to elaborate how the work practices, individual and organisational identities, structures and processes within the case organisation reflect both the firm’s history and also its embeddedness in the organisational field. In the following, quotation marks indicate passages of text that originate in audio-recorded observation, structured and unstructured interviews and archival material that were not rephrased or altered in any way by the researcher (because the exact wording is deemed significant).

6.3.1 Almost one hundred years of Corgan history

The case organisation, which in the following is just labelled Corgan, was founded in 1918 when Francis Turner, a returning serviceman from World War I, purchased a sole engineering practice (established in the 1890s) from William Butler in Auckland, New Zealand. One of the first projects of the practice was the structural engineering work on the Auckland War Memorial in the 1920s. In 1928, James Murphy joined the practice. In the following years, Turner and Murphy were involved mainly with civil engineering works, notably the Pukekohe and New Lynn sewerage schemes, for local authorities. After Murphy’s death in 1933, Matt Berninger joined the practice in 1939. During World War II, Turner and Berninger’s newly formed partnership was commissioned to design and construct gun emplacements on Waiheke Island to protect Auckland Harbour and other defence structures along the New Zealand coast.

During the war, Turner & Berninger were ‘manpowered’ by the New Zealand government, indicating that their practice was considered an essential business and required to continue its operation. This strong relationship with the New Zealand Defence Force has shaped Corgan until the present day as one research participant reflects:

You know you've got to recognise that Sir Francis Turner founded Corgan in 1918 when he came back from World War I. So right from the founding father through to today we have employed a large number of defence personal. So we understand what their business is all about.

After the Second World War, the firm was involved primarily in structural projects for many of the time's prominent architects. William Corgan, a highly decorated fighter pilot who did his engineering education after returning from WWII, joined the firm in 1952. After Francis Turner died aged 64 in 1954, William Corgan was offered partnership in the firm. By that time, the practice adopted the name Turner, Berninger & Corgan. While Turner and Berninger focused on technical engineering work, William Corgan is said to have been the driving force behind the company's growth in the following decades due to his "well-developed sense of business" and his ability to build relationships with clients. The decade after 1954 is accordingly portrayed as an extremely productive time, with staff numbers expanding to 30 in 1964, including Conor Oberst who joined the firm in 1959. In this period, the firm was extensively engaged in major industrial projects and civil engineering work for local authorities, which significantly widened the client base. By this time the firm already enjoyed a high reputation for its innovative designs, notably the grandstand at Ellerslie racecourse in Auckland.

In 1965, Matt Berninger retired and died in the following year. In the same year, Conor Oberst returned to work for the firm, after several years of working in London for the engineering design firm Ove Arup (now a global, multi-disciplinary firm with approximately 14,000 staff). Shortly afterwards, he was offered a 40% partnership at Turner, Berninger & Corgan, with William Corgan retaining the remaining 60%. The firm continued to operate under the name Turner, Berninger & Corgan. Around the same time, William Corgan began to endorse the role of engineers as "principal advisers" on all issues related to a construction project. This ultimately changes the profile of the practice from a structural and civil engineering base to a multi-disciplinary consultancy. Historically most building projects were awarded to architectural firms who themselves sub-contracted the engineering work. However, Turner, Berninger & Corgan, however, was one of the first firms in New Zealand where clients started to bypass the architects and awarded industrial buildings contract 'in their own right' to an engineering firm. The architectural practices became as a result the sub-

contractor which unsurprisingly created some tensions with those firms. Nevertheless, Turner, Berninger & Corgan gradually and successfully positioned their firm as being able to do all engineering work on any given project, and build a national reputation around that capability.

In 1968, Turner, Berninger & Corgan merged with Wellington-based engineering practice Gahan & Gore, because a presence further south than Auckland was considered advantageous. Gahan & Gore enjoyed a high reputation for water and waste water civil engineering and structural engineering (in particular earthquake resistant design) which also enabled the firm to expand its service offering. The newly founded partnership, named Corgan, Oberst, Gahan & Gore (COGG), continued to operate nationwide on ever larger projects. Since the early sixties, William Corgan had been an advocate of a conventional corporate structure for consulting engineers, offering substantial protection of their clients' interests through professional indemnity insurance. Lobbying by William Corgan led to legislative changes and Corgan, Oberst, Gahan & Gore Ltd incorporated in 1972 as a company, replacing partners with shareholders. By that time, staff numbers had grown to 200 with 8 shareholders. The 1970s and 1980 were a period of rapid growth and domestic and international expansion, particularly in Australia and South-East Asia. The firm established offices (often preceded by joint venture projects) in Tauranga (1979), New Plymouth (1983), Christchurch (1989), Melbourne (1973), Sydney (1988), Indonesia (1976) and Singapore (1977).

It is notable that domestic and international expansion was often not a result of strategic considerations but rather a combination of personal relationships, existing reputations and individual ambitions that offered some opportunities in foreign markets. The firm was domestically involved in many of the large engineering projects of the period; The NZ Steel Hot and Cold Rolling Mills was the largest industrial project undertaken in New Zealand at the time with a capital value of \$650 million. The firm continued to engage also in smaller projects irrespective of their initial commercial returns; According to Conor Oberst, William Corgan's credo was to "win projects no matter how small because they might lead to something" and that as long as you do good work "the commercial results should follow". In the 1970s the firm also engaged in a project to optimise the New Zealand transport systems by providing one of the world's first 'economic inter-modal efficiency' studies on the of domestic road, rail and shipping network. Until the present day, the firm recognises this

expertise in transport advisory as a differentiator from its competitors. For example, Corgan engineers were commissioned to provide services such as crowd-flow analysis and evacuation planning ahead of the 2016 Rio de Janeiro Olympics. After William Corgan retired in 1986, Conor Oberst was appointed Managing Director. Shortly afterwards, Gahan and Gore retired in 1987 and 1988 respectively. By the end of the 1980s, the number of shareholders had grown to around 30, with 600 people (350 in Auckland) now working for the firm.

Shareholder and employee numbers continued to grow in the 1990s and 2000s from approximately 800 Corgan Group staff in 1993 (with 42 shareholders) to 980 staff (with 56 shareholders) in 1998 and around 2,000 staff (with 716 shareholders) by 2008. In 1995, COGG was reorganised to create Corgan Group Ltd., a company that owns and oversees all national and international operations of various companies previously owned by COGG, with Conor Oberst appointed as Chief Executive. Domestic and international growth, however, slowed down due to the Asian financial crisis in 1997 and again with the global financial crisis of 2007. Nevertheless, the company formed Corgan China Ltd in 1997 with a Chinese business license, followed by a representative office in Suzhou in 1998. The firm also continued to be involved in many of the largest engineering projects in New Zealand. The Otira Viaduct (near the Arthurs Pass on the South Island), the country's largest concrete bridge, and completed in 1999, subsequently won numerous awards for its innovative design. The commission for Auckland Sky City and Tower, New Zealand's largest ever commercial development, was secured in 1994, completed in 1996 (Sky City), and 1997 (Sky Tower). The successful completion of the Sky Tower project, which at 328m is presently the tallest free standing structure in the Southern Hemisphere, also led to the commission for the 338m high Macau Tower Convention & Entertainment Centre in Macau, China. Apart from being engaged in ever more ambitious engineering projects, the firm increasingly moved into non-traditional engineering work such as software development.

Because non-traditional service areas were considered high-risk, Corgan created separate registered companies to mitigate potential liability. One example is OptiWater Ltd., a spin off company (sold in 2014) where Corgan software engineers developed award-winning software used to optimise power consumption in water distribution networks. Another example of non-traditional services is an operational improvement programme, using Lean Six Sigma techniques, at Auckland International Airport. All the improvements

were process based, without any major changes to the airport terminal or infrastructure, and resulted in a 50% reduction in passenger processing times through international arrivals, despite passenger volume increasing. Due to the practice of establishing new companies for high-risk activities, business complexity increased continually so that the group had over 60 operating companies and units by 2003. In the same year, the group revenue exceeded NZ\$ 100 million for the first time. The following decade saw a series of leadership changes, most significantly the appointment of Mathew Bellamy in 2009 as CEO. Bellamy was Corgan's first-ever externally recruited chief executive, "brought in for his global experience and fresh perspective". The appointment of an outsider as Chief Executive was received with mixed feelings within the firm as the following quote illustrates:

I think it was a success but most people would say it was a failure. So under our previous CEO [Keith Reynolds], who was an external hire, he brought in a whole lot of external people [...] so again he is just gone [...] and our external hire in Asia gone; external hire for Chief Executive gone; So basically the culture was too... they couldn't make any headway. And I do not think it was due to the calibre [of those hires].

Bellamy left the company in 2013 for personal reasons and was replaced by Ian Brown as CEO. As a business press article notes, Ian Brown's appointment meant that Corgan was "shifting back to a leader chosen from within its own rank". Although Brown had 'only' been with the firm since 2004, his relationship with Corgan goes further back to his previous career in the New Zealand Defence Force.

At the time of writing, Corgan is one of the largest employee-owned engineering and related consultancy services companies in the Asia-Pacific. The group has a yearly turnover of roughly NZ\$ 620 million and approximately 3,300 staff who are spread across 19 offices in seven countries (New Zealand, Australia, Indonesia, Singapore, Myanmar, Thailand and Fiji). While the firm claims in an advertisement for future graduates to "have an engineering DNA" its 75+ disciplines include areas of expertise such as planning, architecture, environmental science, software development and business advisory service. The 2014 annual review states that the firm has delivered 4,240 projects for 1,500 clients. One of the largest projects in the firm's recent history (as part of an alliance) is the design and construction of the Waterview

Connection in Auckland that was completed in 2017. The Waterview project was New Zealand’s largest roading project, involving 13.2km of existing and new state highways including 2.5km of tunnel. The firm also continues to receive awards for its innovative engineering designs and other accolades such as New Zealand’s “most reputable organisation” in 2011, “most attractive employer in the construction & engineering sector” in 2016, and “best professional services firm (revenue > \$200 million)” in 2017. At the time of data collection, Corgan still reported record profits for the entire group. This can mainly be attributed to a very strong performance in the domestic market. In its other areas of operations (especially Australia and China) the firm faces increased difficulty due to economic slowdowns, increased competition and its inability to leverage domestic reputation.

6.3.2 Structure, governance & ownership

Figure 6.1 illustrates the key elements of Corgan’s global structure in a very simplified form. At the top level, Corgan Group Ltd. (CGL) constitutes the ultimate holding company for a

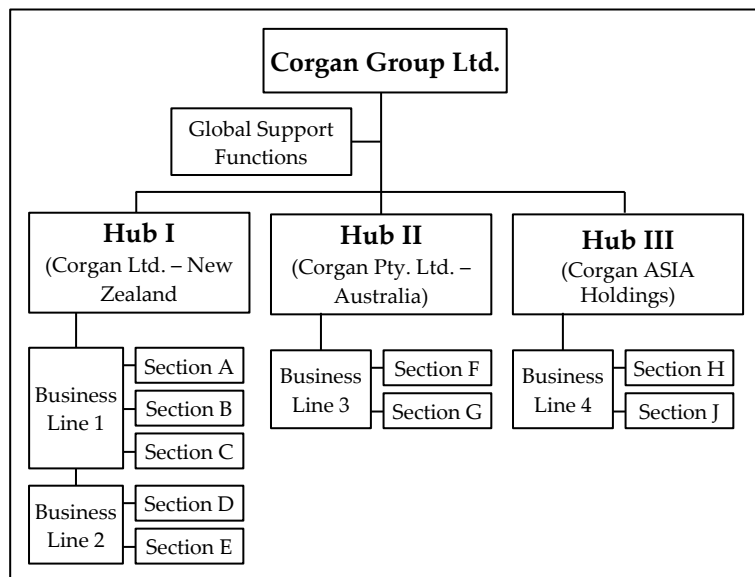


Figure 6.1: Key elements of Corgan's organisational structure

number of wholly and partly owned subsidiaries. Several support functions—such as Group Finance, Group Marketing & Sales or Group People and Culture—provide internal services to the entire Corgan group. CGL is led by the Group Executive Team (headed by the Group Chief Executive) and the Corgan Group Board of Directors. Both consist mostly of

long serving Corgan employees, although there are recent appointments of board members in non-executive positions.

The three main subsidiary companies of CGL represent the firm’s three geographic areas of operation, internally labelled as Corgan’s ‘three hubs’: Corgan Ltd. (New Zealand), Corgan Pty Ltd. (Australia), and Corgan Asia Holdings (Singapore, China and Indonesia, Miramar) together with a range of fully or partly held subsidiaries or joint ventures. Each hub is headed by a Managing Director (MD) who enjoys relative autonomy in their decision making. All three hubs are furthermore made up of several divisions, internally referred to as Business Lines, that essentially represent different disciplines of engineering. Corgan New Zealand, as the largest hub, consists of nine business lines at the moment: (1) Civil infrastructure; (2) Water & Wastewater; (3) Geotechnical, Airports & Survey, (4) Environments, (5) Industrial Services, (6) Power & Energy, (7) Buildings, (8) Project & Cost Management; (9) Advisory Services. The Australian and the Asian hub have a lower number of business lines with the firm providing a more limited range of disciplines. Each business line is managed by a General Manager (GM) who is responsible for the business lines’ strategic direction and the maintenance of client relationships. At the lowest hierarchical level, *Sections* constitute the key element of Corgan’s structure. The relationship between business lines and sections is illustrated in Figure 6.2.

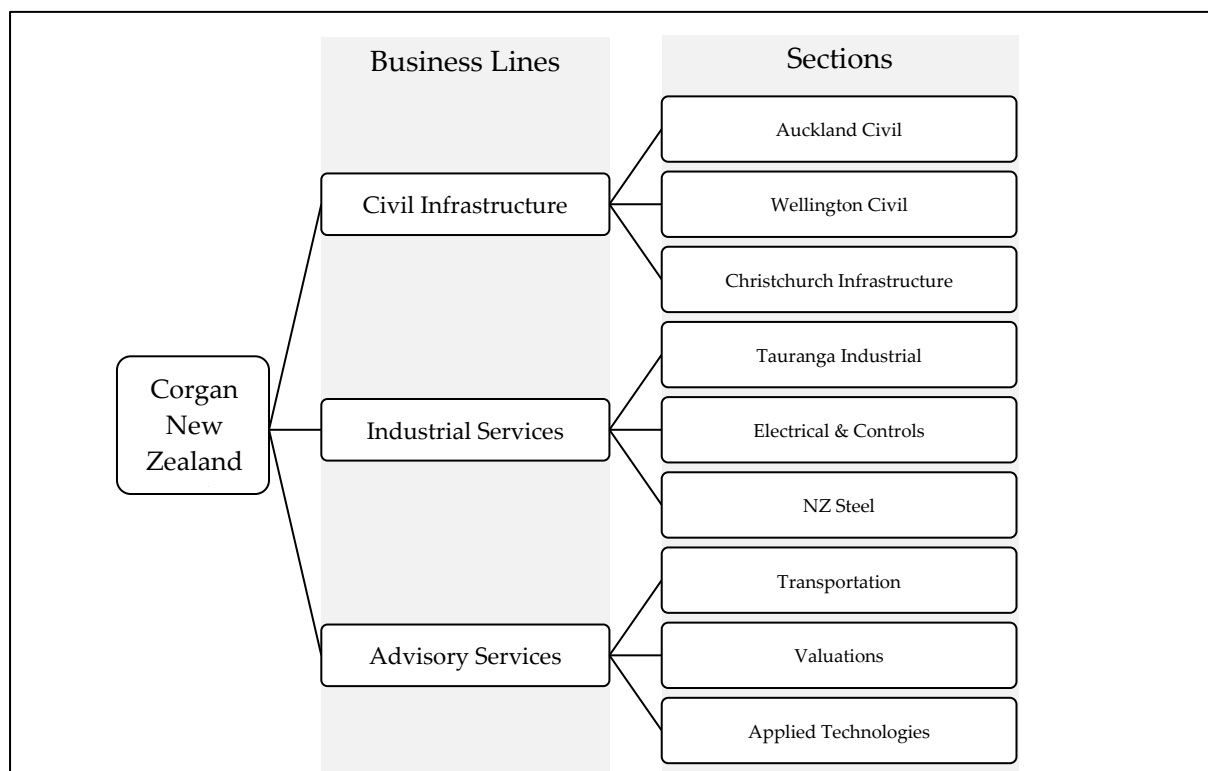


Figure 6.2: Exemplified relationship between Sections and Business Lines

Each business line is made up off several sections, each employing around 30 people. The number of sections depends on the size of the business line. In the New Zealand hub, for

example, Civil Infrastructure and Industrial Services are the largest business lines, each of them comprising eight sections. As illustrated in Figure 6.2, a section is created fairly pragmatically. While some sections reflect different geographical areas (e.g., Auckland Civil and Wellington Civil), others refer to specialist technical expertise (e.g., Electrical & Controls) or to a key client (e.g., NZ steel). Each section is managed by a section manager who leads the group and who is the most important source of information and guidance for a section's employees. Internally, people describe the importance of sections in terms of a very strong "section culture" that puts much emphasis on "section P&Ls [profit and loss]" which in turn "creates silos" between the different sections (and business lines).

Apart from discipline-based business lines, Corgan has established *Market Segments* that are cross-disciplinary and refer to a client's industry. Each of the five key market segment clusters (Buildings, Industrial, Power, Defence and Advisory and Infrastructure), consists of several market segments; One of the key market segments, Food & Beverage, is part of the market cluster Industrial. Each market segment is headed by a market segment leader (usually as an add-on to a senior employee's technical role). The role of market segment leaders is a client facing one, as they build relationships with clients in their market segment, sell services, and coordinate the work delivered by the separate business lines. Corgan's overall structure can thus be described as a matrix system because some business lines (e.g., Project & Cost Management and Advisory Services) theoretically deliver projects for all market segments. Other business lines (such as industrial services) serve mainly the needs of one particular market segment (in this example the industrial one).

An internal handbook for Corgan staff states that: "our clients, and even our competitors, recognise that Corgan is different; and one key difference is that Corgan is wholly employee-owned." The current shareholding scheme was developed in the mid-1980s by Conor Oberst and the Chief Financial Officer. Since then, the number of employee shareholders has steadily climbed from 20 in the early 1980s to over 1,200 at the time of writing; around one third of employees in all locations of the organisation have some level of shareholding. All Corgan shares are shares in Corgan Group Limited and ownership of shares in Corgan is distinct from employment. Thus, employees have no rights to purchasing shares, but shareholding is offered to selected individuals, including non-engineers, based on a quite vaguely defined set of criteria that include the individual's "contribution to the business",

“length of service”, “winning work”, or “commitment to a long-term career with Corgan”. The firm believes that this ownership model improves teamwork and commitment, because “as shareholders, employees have direct opportunity to contribute to and share in Corgan’s successes, growth and profits [and to become] ‘masters of their own destiny’.” The share price is set annually by the CGL Board of Directors after obtaining the advice of a qualified Chartered Accountant. The valuation takes such factors as past and forecasted group financial performance and the wider economic environment into consideration. For higher level employees (who typically own more shares), dividends from shareholding constitute a significant part of their annual pay package. Once an employee leaves Corgan (or reach a certain age) they have to sell their shares for the set price. However, as one professional pointed out: “Corgan is not a democracy” with most shares being non-voting and not providing any power to direct the executive team. Only eight employees (typically Corgan Group Board members) hold shares with voting rights and can initiate corporate actions or make substantial change in the firm’s operations.

6.3.3 Processes, systems and practices

Figure 6.3 is taken from an internal presentation that introduces the fundamentals of financial reporting to Corgan professionals. Although a number of Key Performance Indicators (KPIs)

Key Performance Indicators (KPIs)
<ul style="list-style-type: none"> ▪ PRODUCTIVITY ▪ Time Revenue Per Direct Hour ▪ Net Direct Costs/Salary ▪ NET LABOUR MULTIPLIER ▪ Salary Cost/Standard Hour ▪ Overhead Percentages ▪ Net Profit Before Tax/Time Revenue

Figure 6.3: KPIs at Corgan

are mentioned, two of them (Productivity and Net Labour Multiplier) are in capital letters. While this might seem insignificant at first, these also emerged during the field work as the ones that shape the daily life at Corgan most profoundly. Productivity indicates the hours per time period (e.g., week or month) that Corgan professionals work on tasks that are chargeable to a particular

project. Productivity thus refers to the already introduced performance measurement logic that has significant importance (under various labels such as utilization rate, billable or chargeable hours) in the entire engineering consulting field and other fields like accounting

or law. To calculate productivity, employees complete a weekly electronic timesheet to account for the hours they worked on projects. All work time that is not related to specific projects (such as internal trainings) is considered 'non-productive' time and employees have to justify when they have an above average non-productive rate. The high importance of the productivity measure within Corgan is quite tellingly illustrated by a participant who remarks: "THE measure, THE measure that is measured every week... that is the most focused measure is productivity; ...and we get beaten up by that all the time". Participants claim that Corgan's business model is based on the fundamental assumption that an above 80% average productivity equates to an overall profit that satisfies shareholder expectations. Closely related to productivity is a measure labelled Variance that equates the costs charged to a particular project (in essence the hours entered on timesheets, times a set charge-out rate that is dependent on the employees pay level), and the amount Corgan is able to charge the client.

While productivity is used to evaluate the performance of individuals, sections, business lines or the entire company, the Net Labour Multiplier (NLM) is considered to be a project profitability tool, calculated as follows:

$$NLM = \left(\frac{\text{Total Revenue} - \text{Expense cost}}{\text{Labour cost}} \right)$$

In the course of data collection, several professionals remarked that most people do not really understand how NLM is calculated or what it exactly represents. Yet, as one informant pointed out, Corgan staff typically understand NLM as a desired bandwidth where "low 2s is bad, high 2s is good. 3s is great". An internal presentation refers to the same NLM target range when introducing the measure: "2.3 to 2.5 is the target overall to make about 14% NPBT. 2.0 is considered breakeven". In essence, both KPIs (NLM and productivity) are internally treated as an institutionalised proxy for profit with the basic assumption that securing new projects and delivering them will result in a sufficient amount of overall year-end profit under any circumstances. This focus on winning and doing is reflected in a presentation that introduces financial management on sections as follows:

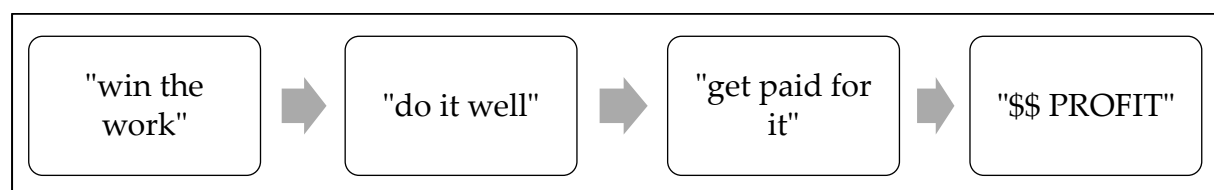


Figure 6.4: Financial logic at Corgan

Corgan staff is consequently predominantly incentivised (although not monetarily) to focus on winning new projects and to deliver them while minimising variance, and maximising productivity and NLM. The firm's management reporting systems reflect productivity levels of individuals, sections and business lines or the NLM of projects and market segments. In fact, the actual profitability (in total dollars) of the work delivered is less well known. While NLM can be seen as a profit margin, the calculations in the background are rather crude because cost of sales and overhead costs are allocated quite arbitrarily to projects. Speaking about this with a key informant he reflects: "Yeah. Because our business model has worked nicely without having to understand [the profitability of work]. You just turn up, win work, do work, get paid, go home. It worked really well."

One of the key events in a typical work week at Corgan are the Monday Morning Meetings; in those, section managers, senior managers and the managing director share news from their sections, big project wins and missed opportunities, and discuss people movements. Section managers then hold a section meeting to brief their own teams on company-wide news and to review workload. One document that is prepared for each of those meetings is a so-called Productivity Report that lists employee names and their average productivity for the year. The report is sorted based on individual productivity, showing people above a certain threshold in green and those below in red. The mentioned focus on winning work is also celebrated regularly in formal and informal ways. For instance, Monday Morning Meetings and other social events such as the annual leadership conference or the internal 'weekly update' emails often start with the announcement of business lines or sections who were able to successfully bid for large engineering projects.

6.3.4 Organisational culture

As suggested by the literature on professions and professional service firms, Corgan employees enjoy a large rate of autonomy in their work and "quite loose controls on what [staff] can do within reason". One member of the executive team refers to a "culture of optional adoption" at Corgan that empowers people to take initiative and pursue their aspirations but creates issues "when you come out with a rule that people do not agree with". Others remark that "mandating anything in Corgan is not the way to get it done; because

generally people will ignore it." One of the key informants emphasises this aspects quite drastically when he argues that:

There is not many companies I know of where the Chief Executive asked you to do something and you do not do it and you do not get in trouble. Because the Chief Executive assumes that you would probably do not do it. It's incredible.

Another aspect mentioned frequently when speaking about Corgan's culture is a certain risk-adversity or conservatism. Although Corgan staff would understandably maintain that "engineers are inherently conservative because [...] otherwise people die", it was argued that Corgan is "unusually conservative", even for an engineering firm. Some claim that this conservatism proved to be beneficial in past economic recessions when many competitors went bankrupt but Corgan stayed in business. On the other hand, it is also believed to make Corgan somehow "investment shy" as this is what "worked in the past" and "[Corgan has been] very successful without investing". The firm's strategy is built almost entirely around organic growth; acquiring another company is generally considered too risky, incompatible with the culture or simply just not in line with the dividend expectations of the shareholders. Although there are mergers and acquisitions (M&As) throughout the firm's history, some of them proved unsuccessful ("We've made some real fuck ups with M&As") which in turn made the firm even more wary of investing in uncertain ventures. As one professional reflects: "[For Corgan] it has to be 100% certain and then when it fails after we thought it was 100% certain we will never do it again. Ever. E.V.E.R. Ever. Lots of examples for that. We will never do that."

Although the technical work of Corgan engineers is always based on quantified measures, strategic decisions seem to be based more on intuition and individual ambitions. For example, participants would remark that the firm opened offices in another country not because of any strategic considerations but merely because "this employee wanted to live and work there". This was also visible throughout the participant observation fieldwork. The author of this thesis created an Excel model (based on his background in management accounting) that provides some decision support regarding Corgan's future strategy around performance measurement, work sharing and internationalisation. After that model was

presented to the leadership team, the two key informants for this study and the researcher met to discuss further steps. At the beginning of the meeting one professional (a member of the executive team) pointed out that the model “resonated quite well with people. You know, us actually providing some insights based on numbers is a good, new concept”. The other one (a business director) half-jokingly responded: “Yeah, novel,” emphasising their opinion that many strategic decisions at Corgan are not based on ‘hard facts’. While this is a rather humorous episode that might seem insignificant, what was apparent throughout the fieldwork was a lack of financial based decision support (that might be expected to be provided by some sort of management accounting function) for quite far reaching strategic considerations.

Professionals who were not strongly socialised within Corgan are generally treated with a fair amount of scepticism. Speaking about this observation, an informant mentions the case of a section manager with a Master’s degree in engineering, and an extensive career in leadership positions at large, international engineering firms, who joined the firm three years ago. To this date, this professional struggles as the “internal network will not give him the credibility or the recognition for what he has already done” because he is (still) seen as a new person who “hasn’t grown up in Corgan, and doesn’t know the Corgan way of doing things”. Others note that “over the course of Corgan’s history, apart from those independent directors, we do not really have any non-engineering or even external for that matter who has gotten up to the board level.” Similarly, Corgan often tries to develop solutions in-house without involving outside service providers; For example, a lot of the firm’s IT systems are either developed entirely by Corgan software engineers or customised by them to a high degree. One informant notes in this context:

I think the major thing we could do [...] is to be open to the idea that there might be some advice out there which we can pay for that might benefit our business. We solve all of our problems ourselves and we are very, very, surprisingly poor in being open to the idea that there might be a person out there or an organisation out there who can help us with our challenges [...]. We will roll our sleeves up and fix them ourselves.

6.3.5 Organisational responses to market dynamics

From the beginning of the fieldwork, many participants stated unanimously that “Corgan’s core services [...] are becoming more commoditised”, because of “new technology around design processes [...] and new technology around global working” and that increasingly “businesses from around the world competing for the same work that you compete for”. Thus, although Corgan is profitable, the firm increasingly suffers from declining margins in its traditional service offerings due to the same dynamics, those of globalisation, technology and new field entrants, that are eroding margins in the entire engineering consulting industry (“it’s almost going out of business territory”).

The firm’s response to those market pressures is considered internally to be “the simultaneous pursuit of differentiation and low cost”. For Corgan, ‘low-cost’ refers to organisational innovation in attempts to reduce the costs of delivering existing services through higher standardisation, offshoring and increased use of technology, whereas differentiation represents service innovation as the firm endeavours to diversify into non-traditional engineering areas. Those services are described internally as a “mix of management consulting and technical expertise”. The non-traditional engineering services are delivered by Corgan’s Advisory Services business line. The next section introduces the history of this business line, the services that are offered and the professionals who deliver them. This is done for two reasons. First, professionals working in this business line portray themselves and the work they do as distinctly different from “the rest of Corgan”. Second, bearing in mind that scholarly research has already shown that “[management] consulting introduced a new logic into audit firms” (Suddaby et al., 2009, p. 415), the foray into non-traditional service areas is also inherently intertwined with a more commercial notion of doing engineering consulting work.

6.4. Corgan’s Advisory Services

One interviewee remarked that “Corgan has existed for a long period of time [...] nearly a hundred years and its foundation is in traditional, very, very traditional engineering”. However, around 2005 the then CEO, who is still regarded as “quite a thought leader and quite brave”, identified an opportunity to provide software services to the New Zealand Defence Force. This opportunity turned into an ongoing contract for ‘technology consulting

services' with the Royal New Zealand Airforce. The key reason for securing this contract was the "long history with defence in New Zealand [and] the high degree of trust in [Corgan's] relationship" with the client, but "there was no track record of this particular set of skills being applied." To deliver the services, Corgan "put together quite a unique team with some very interesting skills", many of whom are now in leading roles in the Advisory Services business line. To reduce potential liability stemming from the new service offering, the firm established a high-risk trading vehicle branded Corgan Applied Technologies Ltd. (CAT) as a wholly-owned subsidiary company of the Corgan Group. Marketing material introduces CAT as follows: "Utilising Corgan engineering and business sector knowledge, CAT develops software that applies practical solutions to complex, real-world problems". Besides ongoing software services to the Defence Force (such as the management of capability upgrades to communications, sensors and weapons systems on Navy ships), CAT professionals also developed software products (e.g., geospatial mapping, asset management) that are utilised for in-house engineering projects and are also sold externally. While CAT was always considered to be a place for experimenting with new services described as non-traditional, this aspect became more formalised in 2012 when CAT was integrated into Corgan Group Ltd. as the new Advisory Services business line. Yet, as one interviewee pointed out: "The culture of Advisory Services was born from this CAT, which had a specific culture that was very, very different than the rest of Corgan".

Although the software products and services delivered by CAT can already be considered as attempts to diversify Corgan's service offerings, those efforts became more formalised in 2013. By then, and prompted by increasingly declining margins from existing services, Corgan began to focus more deliberately on the strategic growth of Advisory Services, for instance by hiring non-engineering professionals to establish and grow adjacent, non-traditional services. The differences between Advisory Services and the more traditional engineering consulting offering are illustrated in Table 6.1 (based on presentations that introduced the concept to staff). The table depicts the typical life-cycle stages of a major asset, starting with an evaluation of the strategic and commercial benefits from an envisioned asset, to the actual planning, design and construction of that asset through to its ongoing maintenance and management. The life cycle should be considered continuous because after an asset has reached the end of its usability, the sequence starts anew for a replacement asset.

In fact, the main rationale for the firm’s attempts to diversify its services is to create long-term, ongoing relationships with its clients by offering “a ‘one-stop shop’ throughout their business cycles”. While Corgan’s (and other engineering firm’s) existing offerings are related to the plan, design and construction phase, Advisory Services is positioned in those earlier stages that are supposedly characterised by higher margins (and also by smaller projects). The firm simultaneously began to focus more explicitly on the later stages of the life cycle by introducing an operations and maintenance (O&M) offering that is part of the Advisory Services business line.

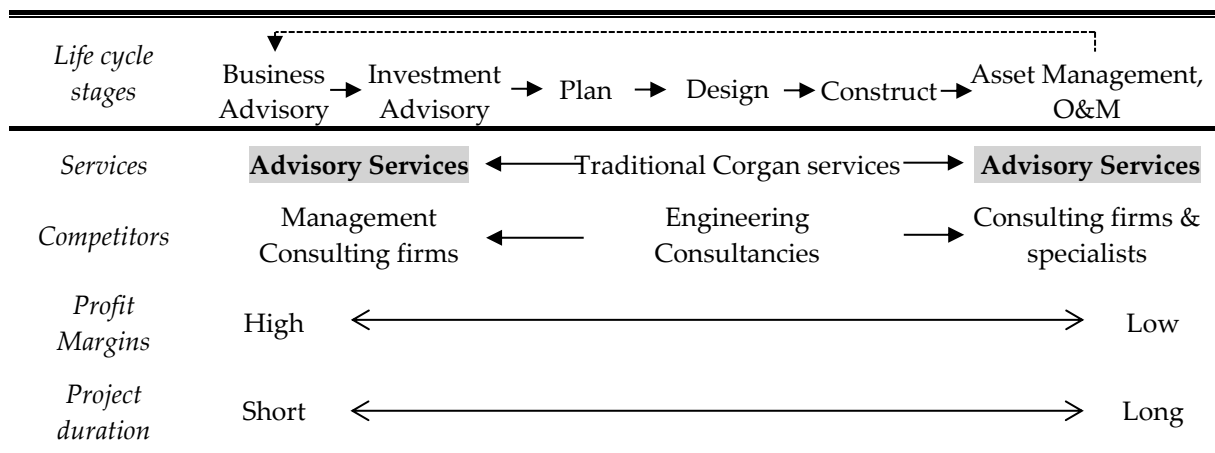


Table 6.1: Services through an asset's lifecycle

Thought to be manifold is Corgan’s perceived advantage over its competitors (generally the large accounting and consulting firms) in the earlier life cycle stages of the asset life cycle. First, Corgan professionals usually argue that they provide the same services for a lower price than the incumbent firms would do. Second, given the firm’s long history and its well-known brand in the domestic market, professionals claim to already “have relationships with all relevant clients in New Zealand”. Third, compared to the accounting firms, the technical knowledge and asset-related expertise that Corgan professionals possess, is displayed as particularly important. Most of the new services are in fact still somehow connected to Corgan’s standard offering and therefore to some asset related activity. The IT security services, for instance, are considered as complementary to the design of physical access control and security systems. Finally, while the main differentiator that Corgan professionals habitually emphasised is their hands-on and practical mind-set that supposedly stems from the engineering profession, the accounting firms were often accused of just “telling the clients

what they already know” without “helping them to solve the problem”. The following quote, analogously echoed again and again, illustrates this quite nicely:

In Corgan, what we do is we come in, yes we will help you identify what the problem is, but more importantly we will work with you to support the changes and then help make these changes on the ground and take some responsibility for making those changes and improvements on the ground and then following that through. So I talk about us being boots on the ground. We are people who actually do the work. Not just write you a report.

The services that are offered as Advisory Services are quite diverse, and broadly speaking refer to some form of (management) consulting in the context of (1) IT security; (2) enterprise risk management; (3) business performance and change management; (4) business process modelling & simulation; and (5) health and safety matters. Notably, health and safety (H&S) consulting is done by the firm’s corporate health & safety (H&S) professionals. In contrast to H&S, most of the other services originate in the purposeful recruitment of external specialists hired to define and grow the offering. While efforts to establish those new services are often portrayed as calculated and strategic by the firm’s management, talking with the professionals who actually deliver them presents a different picture. In most cases, while there was some strategic component to the decision, this was in combination with rather accidental or opportunistic elements as the following quote illustrates: “I think they’ve had visions of enterprise risk management service within Advisory. I just happened to come along with a background in risk management. Yeah, so I think it was more opportunity than anything else”. Other non-engineering based services such as the firms Lean/Six Sigma offering (part of the business performance services) evolved almost exclusively from the personal interest of individual professionals who joined the firm with expertise in a particular area:

I asked a lot of questions around Lean and Six Sigma and everyone said: Nah. No. We do not do it [...]; so get back in your box [Laughs]; not like that, but you know what I mean. It was very hard to sell that.

Aside from being positioned in other parts of the asset life cycle, Advisory Services have other common characteristics that were stressed by many participants who work in Advisory Services. First, when talking about competition, Advisory Services professionals would

initially mention the Big Four accounting firms but not other engineering consultancies. Second, while engineering consulting work was usually shown as resulting in some tangible capital asset, Advisory Services staff know they offer more intangible advice in order to achieve a client's desired "business requirements" that might involve a "capital investment or just changing the business". Third, typical Advisory Services projects were described as rather short termed and delivered by a small group of Advisory Services professionals. By contrast, engineering projects can last for years, have multi-million dollar budgets, often involving a large number of Corgan professionals from multiple business lines or other firms such as contractors and project partners. Fourth, given the project characteristics in Advisory Services (high margin/short duration) and Corgan's poor reputation for those services, the efforts and costs necessary to acquire new projects is seen as disproportionately high compared to engineering. Fifth, while the delivery of engineering services usually involves an interaction with technical staff in client organisations (e.g., the engineering manager), Advisory Services support (and are procured by) commercial executives (e.g., the CEO and the CFO). Finally, professionals in Advisory Services explain the work they do, the skills they need and the way they interact with clients, as distinctly different from engineering projects. Engineers are portrayed by Advisory professionals as working on projects with clearly defined problems and solutions:

[The client] has got a problem, he's got something over here and he wants to get over there and there is a river between the two. So the solution is a bridge. So there is lots of science, lots of example that goes back to before the Romans how to build this thing. It's doable. It's engineering.

Based on that, Advisory staff would claim that engineers "work in that delivery space where they are doing the work but they are not in that space of having to work with clients close" because they do not "really have to understand what the client needs". In contrast, Advisory Services are argued to be much more "ambiguous", "nebulous", "subjective", "far less tangible" and in general more "about understanding what the client really needs" which necessitates ongoing and generative relationships with clients:

[Advisory Services] is really about helping an organisation to get from A to B, sometimes without knowing where A is or where B is, what the client's appetite is, what your appetite is and what your role is in the journey itself.

Advisory Services professionals see their work as involving "a more holistic balanced view on life" as they "need to look at the whole company not just that part of a company". This in turn is said to require "communication skills", "lateral thinking" and in general "lot of interpersonal skills that you require as a consultant that you do not necessarily require as an engineer". Professionals working in Advisory Services also often contrast themselves and their personality to the stereotypical engineer in other business lines: "If someone is really into something really cool and they are really dynamic so that's what we like. [...] So culturally, again I think we are a little bit different from the rest of the business". Others describe the main differences in their "comfort with chaos" and in their "generalist approach" versus the technical specialists in other parts of the business.

Finally, the educational and professional background of Advisory Services professionals is more diverse than that of the rest of the company. While some have quite distinct qualifications in fields like paramedicine, psychology or IT security, the majority of professionals working in Advisory Services have some form of engineering degree. Yet, in most cases this is complemented with more commercially-focused credentials and interests such as conjoint programmes (a combination of commerce and engineering), MBA degrees or a general interest in management consulting.

Table 6.2 summarises the most significant differences between the Advisory Services business line and “the rest of Corgan”.

		Engineering Consulting	Advisory Services
Market and clients	Main competitors	Engineering consulting firms	Accounting/consulting firms
	Ambiguity of problems	Low	High
	Role of client in service delivery	Ex-ante problem definition	Co-production
	Decision maker in client organisation	Engineering manager, COO	Commercial managers, CEO, CFO
Project	Project value and duration	Multi-million, one-off projects, often delivered over years	Small project values, shorter projects
	Outcomes	Tangible artefacts	Intangible Advice
	Costs of sale vs. project value	Low	High
Professionals	Required skills and knowledge to deliver services	Technical	Amalgam of technical and commercial knowledge
	Educational and career background of professionals	Engineering education; Corgan often only employer	Formal engineering education in combination with a commerce degree; work experience outside Corgan
	Identity of individuals	Technical experts	Commercial oriented, risk-takers

Table 6.2: Key characteristics differentiating Advisory Services

While one might expect that Corgan’s strategy to diversify into non-traditional service areas aims to generate additional revenue from existing clients, the firm’s predominant rationale is to “lower the cost of sales for existing services”. By providing front-end services and building strong relationships with clients who are considering capital projects, Corgan is hoping to either sell engineering services without having to engage in public bidding, or to utilise the in-depth understanding of the clients’ requirements developed through their advisory activity in the subsequent bidding process. Parallel to this, the firm is also putting a good deal of emphasis on increasing the profit margins from its existing service offering through automatisisation, offshoring or in general by increasing the “commercial acumen embedded in [the firms] approach” of winning and delivering engineering work. The firm’s simultaneous pursuit of diversification into non-traditional service areas (Advisory Services), organisational innovation to reduced costs of selling and delivering traditional ones, and increased overall commercial acumen in doing engineering consulting, is internally considered as a fundamental in the firm’s “business model” (as participants called it).

6.5. A tale of two logics and actors

This section integrates theory on institutional logics and professional service innovation with the findings on the organisational field and the case organisation to elaborate the institutional logics at play. Before data collection commenced, it was expected that Advisory Services would be underpinned by a different logic in comparison to Corgan's traditional engineering business lines. During the fieldwork, however, it emerged that the efforts to grow Advisory Services are part of a broader vision to promote a more commercial approach towards the ways new projects are won, how the firm organises to deliver and sell services, and also what the role of professional engineers in the service delivery process is. Internally, informants spoke of a "new business model" that they wanted to promote within the firm. This section adopts this business model language in order to distinguish between a current model (professional-engineering), and a desired or envisioned alternative (engineering-advisory). Whereas the current model reflects many ideal-typical elements of the professional logic, the alternative incorporates elements from a commercial-market logic while some elements of the dominant logic persist (see Table 3.2).

6.5.1 The professional-engineering model: Win work and do work

Corgan's dominant logic (and the one best characterising the field) incorporates many elements that the literature attributes to an ideal-typical professional logic. Thus, structures, processes, practices and identities are centred on winning large-scale engineering projects and delivering them in a technically excellent way. This is perhaps best illustrated in the already introduced "win work, do work, get paid" mantra that guided the firm in the past.

At the field level, winning work is usually believed to result from demonstrated technical skills in previous projects (track record) and individual expertise of professionals involved. As one professional pointed out: "Traditionally our model was more reactive in the sense that we would deliver good work and then we would wait". Others describe Corgan marketing and sales approach as "too humble" because engineers tend to "assume too much that [their] actions speak enough." Also, it emerged in the course of the field work that the firm's marketing department is met with a fair amount of scepticism and contempt. One professional pointed out that "sales and marketing is the hardest place to work in this business" because you are "constantly under-resourced" and others argued that non-

engineering employees are in general not valued highly within Corgan. Along the same lines, the broader literature suggests that historically professionals have regarded marketing as “inappropriate, unprofessional and undignified” (Hogan et al., 2011, p. 1271). Corgan’s corporate functions are consequently characterised by a high staff-turnover while engineering professionals typically stay for a longer period of time with the firm.

Corgan’s organisational culture, practices and processes equally represent many elements of an exemplary professional logic, such as professional services that are “provided by firms dominated by one profession” (Greenwood & Suddaby, 2006, p. 35), risk-adversity (Barratt & Hinings, 2015), shared-ownership (Greenwood et al., 1990), a predominant focus on organic growth (Thornton, 2002), low levels of routinisation and formalization (Faulconbridge & Muzio, 2016), focus on sales but not profit (Thornton, 2002) and in particular an emphasis on delivering technically excellent professional work (Smets & Reihlen, 2012). As suggested by the literature on engineering and engineering consulting, an all-encompassing focus on delivering engineering work and producing tangible outcomes was immediately apparent when entering the field. Almost all facets of a Corgan professional’s daily life are built around doing engineering work, successfully bidding for large projects and real-world outputs. This is perhaps best illustrated in the focus on productivity to measure performance. As already mentioned, productivity rankings are also habitually used to praise, or objurgate, individuals in the regular Monday Morning Meetings or in internal emails from section managers. One professional who works in the firm’s Advisory business line summarises this quite revealingly:

It blows my mind... and the thing that I think bothers me the most is that the senior leadership are so stuck on that measure [productivity]; and the whole company is so beholden to it that they have to change that before anything else will change.

Illustrating the above, winning large engineering projects is regularly celebrated at formal and informal gatherings. One professional points out that if “you win one in three RFB’s [request for proposals], [that is] what success looks like [at Corgan]”. The actual profitability of projects won and delivered is usually not in the forefront of people’s heads. Speaking about this, one of the key informants reflects: “you know, they will celebrate any project win. Even the really

unprofitable ones they celebrate". The actual profitability of work is additionally quite hard to extract from Corgan's systems as many costs are allocated quite arbitrarily to specific projects, whereas productivity numbers are easily available from the management information system. Internal systems exist to codify knowledge (e.g., regarding clients or existing in-house expertise), yet are not used or updated consistently. Thus, Corgan professionals rely heavily on personal networks and informal knowledge when locating expertise within the firm. As an example, the author was working with another professional on establishing a list of Corgan services similar to those offered by the accounting firms (in order to translate the service description into "Big Four language"). Various internal sources did provide some hints, yet it turned out to be a very challenging task to collate a list of Corgan services, the actual nature of those services, and the individuals who have the relevant expertise to deliver them. A second professional who was working on this project with the researcher remarked at one point, quite frustrated: "if Corgan actually knew what Corgan did, that would be helpful."

Finally, the approach to solving problems and individual identities reflects, once again, elements of the professional logic as identified by existing scholarship. Examples are that professionals determine appropriate treatment for a client's problems (Reay & Hinings, 2009); individuals and organisational identities based on "the quality of craft" (Thornton et al., 2012, p. 56), or the "technical sophistication of advice to client" (Faulconbridge & Muzio, 2016, p. 16); and high commitments to the profession (Suddaby et al., 2009). This was apparent in the already mentioned strong divisional identity based on professional background, that of the firm's "section culture", and the identified importance of the substantial aspects of engineering work. One participant reflects in that regard: "People who are drawn to engineering, they are drawn to the tangible, the physical the built environment, they want to design something and see it manifest in the world". Even top level executives are still profoundly involved in the actual delivery of engineering projects and appreciated by their subordinates because of that hands-on attitude. One participant agrees to this observation when he argues that: "There are some exceptions but most of the time [...] high level people want to be involved in the projects. So they are not forced to... it's just like we can't stop them". In essence, the general theme that emerged was that productivity and doing excellent work is considered more valuable than generating profits. Indeed, informants even argued that even

high level employees do not care so much about profit because people who get into the engineering profession “are not driven by pay.”

Although Corgan professionals would claim to uphold foremost the interest of their clients, others referred to instances where Corgan professionals refused to take instructions from the clients because they perceived the solution the client preferred was not the “the right answer” to the problem. This general attitude of professionals who determine the appropriate solutions for a client’s problem is further underlined by one Corgan employee who, while working on the firm’s sales strategy for Advisory Services, expressed a certain level of frustration with the predominant attitude amongst Corgan staff:

The perception is that engineers are arrogant. It's not a perception! It's a reality. They are incredibly arrogant. Very arrogant; [those engineers] make the buying decision for the client [and decided] what the client would or would not want; [and believe that] everything what they say goes and there is no opportunity for other views that come in.

6.5.2 The engineering-advisory model: Leverage Everything

The label “Leverage Everything” is used internally to describe the engineering-advisory model in Corgan’s vision to integrate traditional and non-traditional services through an assets entire life cycle, to build on-going relationships with clients, and to embed more commercial acumen in delivering and selling Corgan’s services. Implications of Leverage Everything go beyond simply offering additional Advisory Services to clients. Senior participants would argue that Leverage Everything necessitates a re-evaluation of Corgan’s market strategy, internal processes and structures, as well as individuals’ knowledge and preconceptions of what engineering consulting work entails. In 2013, the engineering-advisory model was introduced at the firm’s ‘leadership conference’ as Corgan’s strategic objective to become a: “One-stop-shop 'service integrator' for our clients, able to solve complex problems, deliver complex projects, deliver on-going services”.

Many aspects characterising the engineering-advisory model represent elements of a commercial-market logic as identified in the literature. It emphasises a deliberate development of relationships with key decision makers and pro-active marketing techniques (Greenwood & Suddaby, 2006); it also stresses a firm’s ability to add commercial value to

clients (Covaleski et al., 2003); the importance of customer satisfaction (Malsch & Gendron, 2013; Reay & Hinings, 2009); and in general the capability of offering integrated solutions to clients that are delivered by professionals with diverse backgrounds (Brock, 2006; Greenwood & Suddaby, 2006).

Consequently, informants would claim that the engineering-advisory model necessitates the “pro-active management of relationships” in order to “to strategically approach a client rather than just sit back and wait for the phone to ring “. This was also believed to entail “actually banging our own drum” when projects are successfully concluded. To secure new business, the engineering-advisory model is more reliant on the “hunting skills” of professionals while the traditional model is portrayed as “a farming model”. This increased focus on marketing is also related to Corgan’s low reputation for Advisory Services, a lack of relationships with decision makers who purchase those services (e.g., CEOs and CFOs), and in general the fact that the firm is “very much pigeonholed by most of [its] clients as engineers”. Additionally, the engineering-advisory model shifts the theorised role of the firm (and its professionals) from solving a client’s problems through technical excellence, to the ability to integrate the knowledge of professionals with a diverse set of backgrounds. One internal document outlines Corgan’s desired future market position:

We are seen as a natural consultant for clients with complex assets, bringing the broad range of Corgan’s services together on projects. We have a range of relationships which allow us to win work sole source, and compete well (with the Big Four).

On an organisational level, the engineering-advisory model also entails the continued provision of (low-margin) engineering consulting services for a competitor’s price so Corgan is able to offer ongoing services to clients, and to maintain close relationships in order to get “more cross selling happening across the business”. This, however, requires the delivery of traditional services in a cost-efficient way, and more deliberate decisions regarding “what kind of work to win”, how project teams are structured, and rewarding professionals on the basis of project profitability. Consistent with existing literature, this is characteristic of a commercial-market logic with cash-flow and profit maximisation (Thornton, 2002), standardisation (Thornton et al., 2012), efficiency (Noordegraaf, 2015), deliberate growth

(Thornton, 2002), cross-selling (Suddaby et al., 2007; Wyatt, 2004), customer satisfaction (Reay & Hinings, 2009), the separation of sales and delivery (Cooper et al., 1996), and in general an increased “importance of commercial acumen” (Greenwood & Suddaby, 2006, p. 35).

As a result, the engineering-advisory model is believed to necessitate KPIs that reward profitability in selling and delivering engineering, which in turn means for Corgan to change “those KPI’s that we have lived and breathed for 95 years”. While productivity is still considered to be a good indicative measure on the organisational level, KPI’s that promote cross-selling or project profitability are argued to be more important for the future. Moreover, the engineering-advisory model is based on more purposeful separation between experienced professionals who sell services and maintain client relationships and technical specialists who deliver the work (“maintaining leverage for our gurus”). Making the engineering-advisory model work is believed to require greater formalisation and standardisation of both traditional engineering and Advisory Services. One participant reflects: “Standardisation is the key to the commercial success of this business; not re-inventing the wheel, acquiring gurus for every project; that sounds like fun and it might sound like success but it's not commercial”. This also includes the institutionalisation of client related knowledge that is traditionally held by individuals.

At a more individual level, the engineering-advisory model also emphasises a “generalist” role for professional engineers in contrast to the current “technical specialist” position. This does not mean, however, that the firm requires all engineers to aggressively sell additional services or to engage in some form of management consulting activity. Yet they are expected to possess more “commercial acumen” when bidding for and delivering projects, and a basic understanding of the range of services that Corgan offers, to be able to identify opportunities for additional revenues once their project has finished. While providing technically excellent solutions is still considered an important aspect, the engineering-advisory model also emphasises the need for engineers to “understand the challenges our clients face as a business”, and to provide (or be able to cross-sell) services that add commercial value to the client and to Corgan. In a presentation at the firm’s leadership conference, the “Future Corgan Consultant” was introduced as an “expert on client’s business”, a “top table advisor [who] sells decisions (\$)”, and as a “service integrator”. This envisioned, ‘new take’ on engineering also necessitates that engineers enable “other people to

go and undertake transaction with their clients that they may not have full control over but [that] adds value to their client and brings revenue into Corgan”.

Finally, the engineering-advisory model emphasises a perceived need to recruit more professionals with a broader educational and career background, such as dual degrees (e.g., engineering and commerce). They also look to experience in management consulting firms, and even professionals with a non-engineering background, to lead the non-traditional Advisory Services. However, while the engineering-advisory model highlights the importance of commercial aspects of engineering work, the most prominent features of the dominant professional logic still form the basis of the model. Some informants did question whether Corgan can grow as an employee-owned business, but the ownership model is generally not debated. Complex problem solving for clients with large assets, doing substantial work and producing real outcomes, also feature strongly in the engineering-advisory model. “Practical”, “hands-on” consulting advice and to actually “focus on solving problems” are constantly stressed as a differentiator from the consulting firms who are believed to just give the client a “report, telling them they’ve got a problem”. Solving a client’s problems is for those reasons explained as somehow different by Advisory professionals:

We take a different approach when we manage consulting gigs just like the Big Four will be relying on their, you know, deep routed financial and accounting knowledge to help making their decisions, at the same time we would be drawing on our engineering, logical thinking, analytical approach, evidence based, you know, lots of data to support the statistical analysis and we will be backing ourselves using that.

Table 6.3 contrasts the two business models based on categories used in the literature on institutional logics research (see Table 3.2). As the references throughout this section indicate, the professional-engineering model incorporates many elements characteristically of an ideal typical professional logic. While the engineering-advisory model builds on those elements in its focus “services in the highest area of complexity”, and the ability of integrating engineering and non-engineering expertise, it more deliberately accentuates the importance of commercial aspects of professional work. In so doing, the three interrelated key elements (non-traditional Advisory Services to establish ongoing relationships with clients; minimising costs for

winning and delivering traditional services; and more building commercial acumen amongst Corgan professionals) not only integrate distinctive features of a salient commercial-market logic but also elements of the dominant traditional professional logic.

	Professional-Engineering <i>(Win work, do work, get paid)</i>	Engineering-Advisory <i>(Leverage Everything)</i>
<i>Dominant logic</i>	<i>Professional logic</i>	<i>Hybrid logic between dominant and commercial-market logic</i>
<i>Market approach</i>		
Knowledge claims	Based on technical expertise and existing reputation to solve complex problems	Integrator of technical and commercial knowledge for clients with complex assets;
Market strategy	Re-active selling (bidding);	Long-term relationships, pro-active marketing of services, cross-selling of engineering and non-engineering services
<i>Organisational practices and processes</i>		
Mode of service delivery	Appropriate solutions and knowledge defined by professionals; services are delivered by professionals who sell them;	More focus on co-production of solutions; emphasis on 'keeping the client happy', separation of sales and delivery;
Governance, structures and processes	Employee-shareholding; profit-sharing; KPIs re-inforce delivering and winning projects; high degrees of autonomy and collegiality; low levels of routinization and formalization;	Employee-shareholding, profit-sharing, KPIs reward project profitability; purposeful leverage structures; higher levels of routinization and formalization;
Organisational strategy	Focus on sales and organic growth; based on individual aspirations;	Organic growth but more deliberately based on market requirements;
<i>Values and knowledge</i>		
Key elements of individual identity	Quality of craft and technical expertise; importance of tangible, real-world outcome; high commitment to engineering discipline;	Commercial value-add of advice to clients and firm; profitable delivery of projects; risk-taking;
Knowledge & Experience	Predominantly engineering education; socialisation within Corgan (not much outside experience); technical and client knowledge held by individuals; client knowledge around engineering requirements	Predominantly engineering but in combination with a commercial understanding; institutionalisation of client specific knowledge in databases; emphasis of 'commercial acumen' and 'expertise of a client's business'

Table 6.3: Contrasting the two logics. Source: Empirical data

It is important to note that the engineering-advisory business model should be considered as an envisioned, ideal typical form of organising as advocates describe it, and differentiating it from the existing ways of doing things at Corgan; one of the key proponents of the engineering-advisory business model argued on Corgan's internal social media platform that "our future relies on our integrated cross-selling professional services one-stop-shop". Table 6.3 does therefore not signify an accomplished organisational hybridisation when a

professional and a commercial-market logic is integrated. It shows merely how the alternative business model is imagined and described by Corgan professionals in terms of an alternative future for Corgan. On the other hand that also does not mean that the engineering-advisory model is purely hypothetical and constituted only in the mind of some isolated participants. Instead, emerging from quite purposeful efforts to promote Leverage Everything, some aspects of the daily work of Corgan professionals, and the rhetoric used, reflected elements of the alternative logic, whereas others were still strongly grounded in the professional-engineering logic.

6.6. Chapter summary

The conceptual framework illustrated in Figure 4.1 postulates an 'organisation-as-field with a dominant logic' as the point of origin for this thesis. This chapter provided a detailed account of the significant elements that characterise this dominant, professional-engineering logic that underpins both the case organisation and the broader organisational field. The identified professional-engineering logic reflect many elements that existing scholarship has related to an ideal-typical professional logic (see Table 3.2). This chapter outlines how the case organisations attempt to diversify into non-traditional Advisory Services and related efforts to infuse a 'more commercial take' into the firm can be framed as a process of organisational hybridisation where some elements of the dominant engineering logic are challenged and a salient commercial-market logic is integrated into an envisioned engineering-advisory logic (Schildt & Perkmann, 2016). The following section introduces the micro-practices that actors utilised to promote this shift towards a more hybrid form of organising and the mundane, everyday work practices of engineers that somehow distort those purposeful efforts and lead to unintended consequences.

CHAPTER 7: Findings II—Promoting Leverage Everything

7.1. Aim of the chapter

While the previous chapter presented findings on the research site and the broader context to establish two distinct institutional logics, this chapter offers a fine-grained account of the daily activities of actors that either promoted the emerging hybrid logic (the alternative business model) or maintained the status quo. In doing so, this chapter answers the three research questions in a coherent order. First, the institutional intrapreneur, and his deliberate efforts to construct an enabling position within the organisation, is introduced. Second, the actual practical work of this actor and his ‘accomplices’ in promoting the Leverage Everything strategy are described. The chapter ends with outlining the consequences of those interrelated activities. This chapter is almost entirely based on the observation of actors in their ‘natural settings’ (Lofland, 1976) when they engage in meetings, give presentations, have a chat in the coffee room, and so on. The chapter also draws on the informal discussions that were conducted with the key actor to discuss initial interpretations and open questions emerging from observing the daily life of professionals at Corgan. Again, quotation marks signal passages of text in their unaltered form as spoken by actors in audio-recorded meetings, presentations, (informal) interviews or mundane interactions. Reflecting the language participants used, the alternative hybrid logic that is in the centre of this research is labelled Leverage Everything or the “new business model”.

7.2. A focus on actors: Social position in praxis

Based on the two logics identified, this section demonstrates how the institutional intrapreneur crafted a position within the firm that enabled him to challenge the dominant logic and to promote an alternative. The section thus addresses the first of the three research questions:

RQ1: How do individual actors construct a social position that enables them to challenge a firm’s dominant logic and to promote an alternative one?

First, the personal, educational and professional background of a key actor is briefly outlined. This section then moves to the tactics the actor utilises to enhance his relative position. The

section ends with the impact of the actor's purposeful efforts to portray himself as 'same but different' on his reputation and position within the firm.

7.2.1 Introducing the institutional intrapreneur

Scholars have recently attended to individual life-histories and social origins to explain reflexivity in institutional settings (Suddaby et al., 2016). Along the same line, the generative aspects of an individual's habitus points to reflexive awareness that emerges from experienced inconsistencies between an actor's dispositions and the practices of a particular field (Bourdieu, 1990, p. 55; Gomez & Bouty, 2011; Mutch, 2007). One reason why one of the main informants for this study is considered an institutional intrapreneur can be found in his personal and professional trajectory.

Thomas Yorke, one key informant for this study, portrays his individual skills and interests as distinctly different from Corgan's "dominant personality type". First, he claims to be "absolutely not a good civil engineer". Rather, he joined the engineering profession because of his general interest in "how cars move and how cities work [and] to get into that profession [he] needed to be a civil engineer". Second, he often mentions his non-engineering interests and education. For example, he did distance learning courses in sociology to better understand "how society works" and successfully applied for a governmental scholarship that enabled him to do an executive education programme at—as Thomas stresses constantly—a highly renowned European business school (INSEAD). He left Corgan for a couple of years during which time he did an apprenticeship as a chef and afterwards set up his own engineering consultancy. Thomas continuously emphasised his strong interest in management consulting work and that he considered joining one of the management consulting firms instead of returning to Corgan. However, because he "still loves doing traffic stuff" he decided to re-join Corgan again to "make opportunities for [himself]". In fact, although the Leverage Everything strategy can be considered as Corgan's organisational strategy, it clearly also reflects Thomas's individual interests and aspirations.

Thomas's interests are also reflected in his career within Corgan. After graduating with an engineering degree, he joined the firm as a traffic engineer. However, because he "didn't just want to end up being a really good traffic engineer" he left the company to "broaden his perspective" and joined the New Zealand Defence Force in a more managerial

role. After four years he returned to Corgan (somewhat reluctantly) in a technical role because he could not convince the company that he “should be hired as a manager or a client person”. However, “very quickly” he got promoted to a section manager and subsequently to general manager of Corgan’s Transportation business line. Following an organisational restructure in 2012 where Transportation was merged with the firm’s Applied Technology division to form the new Advisory Services business line, he was appointed the Business Director for Advisory Services. The formal description of this role and the responsibilities that come with it once again mirror Thomas’s personal interests in organisational strategy, management consulting and economics. In several presentations he introduces his role in terms of “looking after [the firm’s] diversification strategy”. Illustrating the notion of an actor’s position as emerging from praxis, the remainder of this section moves away from Thomas’s background to show how he presents himself in daily interactions and formal occasions. The three following sections are structured on the core concepts that have been outlined in section 5.5.5.

7.2.2 The committed regular: Credibility from the past

Although Thomas joined the engineering profession and the firm for reasons different from most professionals at Corgan, his educational background and career within the firm are very much aligned with the dominant logic and thus valued by his peers. Early into research, he mentioned “the benefits of having the credibility here and the track record [and that] I speak the right language, the engineering language”. In presentations he regularly mentions his engineering degree and his first role as a traffic engineer at Corgan. He also continuously emphasises his understanding and appreciation of “the Corgan way” and “the engineering mindset”. He demonstrates technical skills and specialist expertise that are aligned with the dominant logic, even when endorsing the alternative logic. For example, when presenting on the Leverage Everything model he uses the slide depicted in Figure 7.1 where an image of cog-wheels symbolises the idea of ongoing services and remarks: “I like this diagram and I hate this diagram and it’s obviously done by someone who wasn’t an engineer [because] those people will be running backwards very, very quickly”.



Figure 7.1: Slide to demonstrate engineering knowledge

Apart from demonstrating credibility from his formal education, he also gives presentations on his past success as a client relationship manager (CRM) for a large governmental organisation to show how he was able to significantly improve the revenue from this client. Reflecting on this, he agrees that “winning work” is the obvious strategy to increase his reputation within the firm. In a similar fashion, he regularly mentions previous roles, first as section and then as general manager of the Transportation business line in daily conversations and in meetings. Speaking about this with Thomas he agrees that this “indeed gives me some credibility” and that it was “a while ago now but everyone remembers that. It’s got to be a deliberate part of your strategy; to make sure that you are delivering stuff that people value”.

Thomas also regularly demonstrated a high degree of awareness of Corgan’s culture in his references to collective assumptions of the firm. Professionals at Corgan, for instance, are bonded through a shared perception of a particular competitor as a bogeyman who seemingly always delivered suboptimal engineering service but who was, for reasons bewildering to Corgan engineers, very much liked by clients. On many occasions, this portrayal of a competitor ‘who wins work but doesn’t deliver’ was taken up by Thomas as an example of how Corgan’s culture and approach differs from other competitors. Thus, throughout much of his daily work, Thomas is reflexive in his understanding of the “engineering mind-set”, the “Corgan way” of doing engineering consulting work and stresses constantly that he “cares deeply” about the firm and its future. Even so, although he regularly

mentions that “how we do things has made us successful in the past”, he emphasises that the “Corgan way” might create barriers for mastering future challenges.

7.2.3 The dissident: A goldfish in a dark pond

As foreshadowed by his personal background, Thomas’s self-representation is based on a significant degree of ‘otherness’ to most professionals at Corgan. Questioned about that, he argues: “most engineers want data, they want process and they want certainty. Whereas I am the opposite”. Thus, although Thomas demonstrates his understanding of Corgan’s dominant logic in some interactions, on other occasions he portrays himself as distinctly different. First, Thomas constantly mentions his knowledge and skills outside the engineering profession. After returning from INSEAD, he gave several presentations to Corgan employees that were titled “Thomas Yorke goes to Business School”. In those talks he explained that he wanted “a bit more breadth than my civil engineering degree” and in general to:

Just step outside Corgan thinking. We are a fantastically successful organisation. Which means we make successful decisions and we do things a certain way. But perhaps there are other ways of doing things and I wanted to find that out.

In mundane encounters with other professionals and posts on internal social media, he regularly emphasised the top position ‘his’ particular business school achieved in international rankings and the rewarding nature of the experience: “And it struck me that actually the same number of people climb Mount Everest every year who make it to this programme. Both cost the same and I would say both are transformational”. Thomas often mentions his general interest in organisational strategy and management in seemingly incidental ways: “I read a lot of management books... I love it; every fortnight I read through the latest. And my wife says: Thomas you bring your work home. And I say: this is not work... I find it fascinating how organisations work”. On other occasions, even in presentations to Corgan’s management, he quite openly questioned the commercial skills or the business acumen of professionals at Corgan. Continuing the quote above, he remarked that reading management literature is “the same as reading non-fiction. But I do read fiction every now and again. And the fiction I tend to read are [Corgan] business plans”. He does the same by showing an Adidas commercial (see Adidas Commercial, 2010). In this video, the protagonist

wanders around a city and more and more people jump on him; he carries them all (at the end of the clip more than 20). After showing this video (and also in daily interactions) he refers to a presumed existence of “shiny shoes” or “magic sneakers” and Corgan professionals who believe:

If you wear these shoes, you can achieve magic. And I see a lot of this in Corgan. We kind of assume... we do some new venture and somehow magic will happen. We win work, we deliver it and we will make profit.

Occasionally he expresses his disapproval with the senior management’s priorities quite bluntly: in a presentation to young employees he claims that he thinks it is “quite telling that we spend more time telling you where the bathrooms are than how we make money”. In another talk at an annual meeting of the Advisory Services leadership team he argued that “if we were sold tomorrow to someone who had expertise in running global professional services, I’m quite sure they could double our profit”.

Finally, he often stresses how much time he is spending in talking with clients and non-engineering professionals such as the accounting firms and the quite distinct insights he is gaining from those encounters. He regularly emphasises an alleged support by external parties for his ideas. He was speaking about Leverage Everything with other Corgan professionals in one instance and mentioned that he met with a banking executive and “gave him the three minutes speech on Advisory Services and you could see his eyes light up”. As a result, he summarises his status within the firm as follows:

The benefit I have at Corgan is that I am kind of a, what you call, a goldfish in a dark pond [...] I see the world quite differently to most of Corgan which should mean that I get booted out of Corgan but what it does mean is that I am able to stand out and get things done.

7.2.4 The hybridiser: A new world calls for a new breed of engineers

One of the key themes that emerged during this study is the continuously expressed claim that the “world [of consulting engineering] is changing”. Presenting insights into market dynamics at large-scale online presentations, speaking engagements at Corgan’s formal leadership forums, and in mundane interactions in the coffee room enables Thomas to position himself and his role as a key factor in formulating and implementing response

strategies. He continuously stated his formal authority as Business Director to grow Advisory Services and to make Corgan more commercial. He introduces himself and his role in several presentations by showing an image of an airport security dog:

The dog, he sniffs out your cash in your suitcase on the airport and that's sort of my role at Corgan; to look at our business model and to work out why we are working so hard, why we are so successful and why we are making so little profit. We should be making a lot more money.

Thomas regularly positions himself as a “change agent” who was appointed by Corgan’s senior management “to challenge your thinking” and to “lead change in Corgan to grow our Advisory Services market”. Besides stressing his formal position to change the company in the light of field-level dynamics, he demonstrates how his external and internal knowledge enables him to do this. In presentations he uses the insights he gained from the executive education programme and shows how they are applicable to Corgan because “all companies have the same problems we have”. Thomas also makes sure to stress the “realistic, rational research-based evidence” on which his business school knowledge is based. He regularly emphasises that the business line he was responsible for should in fact be considered as an advisory service and not as a traditional engineering one. Finally, when presenting on his past achievements he usually argues that those were possible only because of a significant departure from how “we have always done things”. For example, to be successful as customer relationship manager he argues that “he had to change Corgan [and that] was a breakthrough in terms of taking Corgan away from an [opportunistic] pursuit mentality”.

Lastly, Thomas is very active on the company’s internal social network (Yammer) where he regularly posts links to articles and videos that are related to his efforts to promote Leverage Everything. Speaking about this, Thomas also acknowledges that he has “built a big following on Yammer deliberately so that any message I get out will get read by a few hundred people”. Presentations on topics such as past successes, insights from the business school or his career at Corgan often took place virtually. By using the video conference call functionality of Skype for Business he was able to reach out to a large number of people without being limited to the physical location of Corgan’s headquarter in Auckland. He also occasionally used a rather unconventional way of sending meetings invitations for larger

meetings. Believing that people are more receptive to personal invitations than to simple Outlook meeting requests, he voice-recorded a short message that was then sent to all required attendees (more than 40). Those recordings appeared as 'missed call' in the recipient's inbox, and created the assumption that he called every single participant personally. By using those tactics, he deliberately tried to enhance other professional's awareness about him and his work. He also used to end or start presentations with his "personal mantra: have fun, make money [...] and it became known that those are the things that [he] valued". Questioned about that, he reflected: "So it's quite like a personal brand. I'm a big fan of personal brands. So I reckon half the people in Corgan would know who I am because I have a very big brand".

7.2.5 Thomas's position within the firm

Based on these findings into Thomas's daily activities, one could presume that he is confronted with a fair number of sceptics, or rejection, as he often questions quite fundamental beliefs of the company. Thomas recalls being called 'unethical' for his ideas by some staff, but is generally highly regarded and liked by his peers. At one of Corgan's yearly leadership conferences where Corgan management professionals from all hubs come together in Auckland, one member of the senior management team referred to Thomas as:

One of my personal favourites in terms of 'will challenge your thinking on things'. And what you need to do is take some time out of your day job to get next to edge thinkers and talk to them and engage with them.

Another Corgan professional remarked (unprompted) at an interview conducted for this research that he is "a great fan of doing things differently [...] and that's why I'm such a big fan of Thomas Yorke because he is just such a completely different character in the whole process of things". Also in the course of data collection it emerged that professionals who can be considered as the main advocates for Leverage Everything often used vocabulary, analogies or examples that Thomas had introduced in his presentations or in his many Yammer posts. Questioned about what enables him to say and do things that demonstrate a certain amount of non-conformity with the dominant logic he reflects: "I think if you are seen as a change agent within an organisation you are expected to be challenging the status quo".

That quote captures the idea that promoting Leverage Everything required a skilful creation of distinct social positions during Thomas's interactions with others at Corgan. For Thomas to be able to overcome the possible backlash from incumbent actors, he needed to demonstrate his knowledge of the dominant logic and to portray himself as one of them. At the same time, he needed to make sure that he was not perceived as too embedded to avoid losing his status as 'change agent'. It has to be emphasised that Thomas's formal role does not entail any direct decision-making authority as he is not member of the executive team. This lack of hierarchical power is partially counterbalanced by his manager, a member of the executive team, another key actor in defining and promoting Leverage Everything. As already indicated, however, Corgan's culture is built on high levels of autonomy and consensus driven decision making. Thomas sees it therefore as one of his main tasks to get everyone "on the same piece of paper" and to "map out a way for the rest of the business to get slowly but surely towards that".

7.2.6 Section summary

Introducing the key informant of this study and the ways he presented himself in presentations and mundane interactions, this section addressed the first research question. It showed how actors constructed a social position within the organisation that enabled them to challenge a prevailing professional logic and to promote an salient commercial-market logic within Corgan. The actor demonstrated a reflective understanding and appreciation of Corgan's dominant logic, but also positioned himself as a distinctly different by demonstrating skills and knowledge that align with the commercial-market logic. By sensitising organisational members to field level changes, he was able to reconcile those two positions, and to situate himself as someone who has something distinct to offer, while being sensitive to the dominant logic that guides the organisation-as-field. Table 7.1 summarises the different sets of tactics utilised by Thomas to manage the dynamic tension between being different and being the same.

	The committed regular	The hybridizer	The dissident
Demonstrating formal skills, education and knowledge	Engineering degree, speaking engineering language,	Relevance of external knowledge to Corgan's current situation Rendering insiders knowledge as insufficient in a changing context;	Non-engineering education; work experience 'outside Corgan'; Interest in management and strategy
Demonstrating past achievements and insights into "the Corgan way"	Understanding 'how Corgan works'; personal commitment; success in winning and doing work.	Past success was based on 'doing things differently'; Transportation as an advisory service;	nA
Demonstrating formal support for endeavours	nA	Formal role as a 'change agent', to grow Advisory Services and to make Corgan more commercial; Building 'personal brand'	Demonstrating external support from clients; demonstrating networks with high-level decision makers
Locos of references	Inside Corgan/engineering	Internal and external	Outside Corgan/engineering
Temporal focus	Past	Present	Future

Table 7.1: Set of tactics deployed by actors to enhance their social position

The next section turns to the practical work of Thomas and other actors in promoting Leverage Everything.

7.3. A focus on work: The praxis of change

The previous sections/chapter have introduced Corgan's current business model, the envisioned alternative model (Leverage Everything) and the main actor (the institutional intrapreneur). This section focuses now on the actual day-to-day work of this actor and others in efforts to promote Leverage Everything; it explores the second research question:

RQ2: How do professionals promote alternative logics within their organisations and how is a dominant organisational logics disrupted?

Although Thomas can be regarded as the main actor, the activities presented here do not refer only to his efforts. The efforts of others who either supported him or took their own initiative are also included. The following section will use the term 'professionals' or 'Corgan staff' and only refer to Thomas only when quotes are directly attributable to him. Following the analysis that was described in section 5.5.3, four key strategies emerged that actors drew upon. These can be described as (1) Educating the business (and the clients); (2) Problematizing and alignment; (3) Recruiting, empowering and demonstrating support; (4) Entrenchment in practice. Utilising prevailing institutional nomenclature, each of those strategies consisted of

several ‘tactics’ and associated activities (see Heinze & Weber, 2016). These are discussed in turn to provide a rich account of the material, rhetorical and emotional elements involved.

7.3.1 *Educating the business (and the client)*

Professionals within Corgan spent a significant amount of time creating a general awareness amongst professionals that the engineering consulting sector is undergoing significant changes; to portray Leverage Everything as an alternative way forward for Corgan and to enhance knowledge and skills that is deemed necessary for the alternative business model. The three tactic—sensitising actors, theorising alternatives and educating professionals—will be discussed in turn.

Sensitizing actors. One theme that emerged in the course of data collection is that Corgan professionals do not generally have a very good idea about the dynamics of the engineering consulting market. The exception to this is knowledge about competitors that are currently bidding for projects or that were successful in the process. Consequently, proponents of the Leverage Everything model argued that they’ve been “trying to educate our business about the fact that the world is changing quite rapidly”. They repeatedly organised presentations on “The Future of Professional Services” where they vividly claimed that the “existing market that we had for 95 years [since Corgan was founded], all of a sudden that is changing”. As already mentioned, this also included virtual presentation to reach a larger audience. Presentations usually started by outlining the dynamics that impact the whole engineering consulting industry as discussed in section 6.2.3. The first slide displayed a landscape with a dark sky and an imminent thunderstorm to symbolise the dynamics in the field accompanied by a language of threat and danger:

So its dark storm clouds, not quite sure what's coming; is it gonna break or is it gonna pour with rain; there is certainly lightning around. Down the back there; there goes URS, gone, sucked up by AECOM. There goes SKM, gone, sucked up Jacobs.

Professionals also posted links to websites or management magazines that confirm the alleged ‘disruption of professional services’ such as a paper by Christensen, Wang and Bever (2013). Another key slide that was used consistently is shown in Figure 7.2.

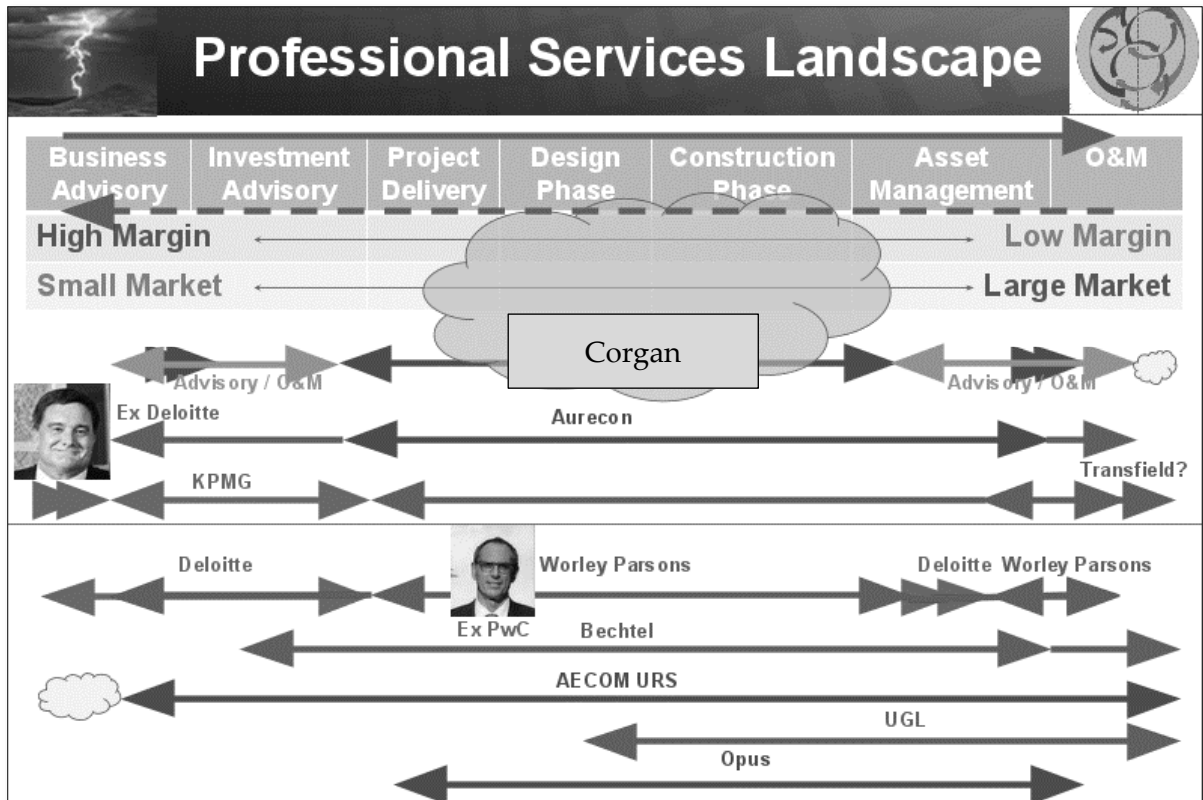


Figure 7.2: PowerPoint slide to sensitise professionals

The slide depicts the lifecycle stages of a major asset (as discussed in Table 6.1) on the vertical axis and Corgan’s competitors on the horizontal one. The different arrows are animated and expand one after another to illustrate the strategies competitors are perusing. Notably, the slide includes not only engineering competitors (such as AECOM & URS, Opus, and Bechtel) but also accounting/consulting firms (Deloitte and KPMG). The key message that actors wanted to convey with this slide is that engineering firms are increasingly diversifying into services that are labelled “Business Advisory” or “Investment Advisory”. The slide conversely illustrates how firms that traditionally provide ‘front-end’ advisory services simultaneously expand into areas of work (such as asset design and construction) that are traditional engineering consulting services. For instance, actors argued consistently that “we are seeing the Big Four coming down to try and grab more of this [our] market”.

Rhetoric and symbols evoked are again centred on fear and uncertainty. For instance, Corgan’s position in the central parts of the life cycle was framed as a “red ocean” where the competition is “really tough” and “everyone is fighting”. The threat from non-engineering competitors was also personalised by using pictures of non-engineering executives who were

hired by engineering consulting firms. For example, one picture was the CEO of Deloitte who was introduced by Thomas as “the guy of my nightmares”, because:

the reason he is smiling is not because he is at Deloitte. It's because he's about to join these guys. So he will be their global Chief Executive at Aurecon. And he's been quite open as to why he is joining Aurecon and what he's going to do at Aurecon. He's saying: Right, I'm going to grow the advisory and I'm going to grow the asset management...; And obviously what he will be able to do is to drag some of his mates from Deloitte through to here to fill in all those gaps very quickly.

Thomas coined the term “the New Twelve” to refer to firms who previously operated in relative isolation, those of management consulting and engineering consulting, but who are “expanding to provide services that cover the full asset life cycle”. In several presentations, Corgan’s logo is included alongside engineering consulting firms such as AURECON or Jacobs and the Big Four firms as part of the emergent “New Twelve” group.

Theorising alternatives. While sensitising work created a sense of discomfort and threat, the portrayal of Corgan as part of “the New Twelve” induced optimism and hope. Indeed, the rather negative rhetoric that sensitised actors was usually followed by proclaiming that “the good news is we know what to do” and the introduction of Leverage Everything as an alternative forward. To demonstrate the soundness and ‘scientific’ rationale behind Leverage Everything, Thomas would evoke his INSEAD education, introducing basic concepts from strategic management. He referred to well-known strategy templates such as “low-cost vs. differentiation” (Porter, 1998), “Red vs. Blue Ocean Strategy” (Kim & Mauborgne, 2005) or “disruptive innovation” (Bower & Christensen, 1995). In meetings he mentioned that I am doing a PhD in this area and “can tell you the science” behind these strategies. Building on this, Leverage Everything was portrayed as a ‘Differentiation’ or a ‘Blue Ocean’ strategy and as a “preferred option” for Corgan’s future. Simultaneously, professionals accentuated the key elements of the alternative business model in terms of competing “in high revenue/low margin (design) and low revenue, high margin (Advisory) services”. Elements that were discussed in meetings and presentations included more specifically “how we win against the

Big Four”, “how we will leverage our Guru’s”, “build solid pipelines of the right type of work” or “embedding commercial acumen in our approach”.

As argued throughout this thesis, this signifies that Leverage Everything does not simply refer to some additional services that are sold to existing clients, but at the same time to a growing emphasis on the commercial aspects of existing Corgan services. Actors also stressed commercial benefits in terms of reduced cost of sales and increased profit margins. In particular, this included claims that Advisory Services are “quite hard to commoditise and quite hard to remote resource [off-shore]” and “will have more resilient margins”. The language used also evoked a sense of urgency in the light of field level changes. Although professionals claimed that Corgan lags behind competitors who “have nailed [...] the integrated business model”, they also emphasised that “it is not too late if we act fast”. It was conversely argued that some engineering consulting competitors pursue “a disastrous strategy” by focusing on low-margin services. These claims were substantiated by PowerPoint slides that depicted the competitors’ share values and a visible downward trend in recent months.

One important element in introducing the alternative business model was the labelling of the new concept as “Leverage Everything”. Reflecting on this, Thomas acknowledges that he deliberately came up with a memorable term because “every strategy has to have two or three name brand, so people actually know what you are talking about”. The label Leverage Everything is not just used in presentations, but also as a hashtag on their social media in all posts that are related to the initiative. Furthermore, a ‘cogwheel’ symbol illustrated the main idea behind LE and was used consistently in presentations.

Educating professionals. Aside from creating general awareness of field-level changes and introducing Leverage Everything as an alternative way forward, professionals (particularly those working in Advisory Services) attempt to educate Corgan professionals to build their “commercial” or “consulting acumen” and their “cross-selling capability”. This was done by organising internal business wargames, workshops and by a leaflet titled “Consulting 101” that explains how to run a client meeting (“do not order messy food”), how to prepare an elevator pitch (“it’s about opening doors”) and the importance of cross-selling (“to see if you could develop more business”). The language used to educate professionals

notably had technical elements in it. When speaking about the importance of profit in contrast to revenue, the analogy of “laws of commercial physics” was induced constantly. By using the polling function of Skype for Business, Thomas also organised a virtual ‘business quiz’ that he titled “have fun, make money” to introduce concepts such as profit and its relationship with business development costs or awarded discounts on services. One question was: “if we decide to change from 90% rates to 70% rates on a bid, how does this affect our amount of profit?”. Another question referred to the importance of “commercial acumen” when bidding for projects. In essence, many of those attempts introduced profitability as an “overlooked success factor” that is often disregarded by Corgan professionals.

Apart from educating professionals in commercial aspects of engineering, professionals also attempted to make others mindful of the new Advisory Services. Although the business line had already existed for several years when I entered the field, not all staff members were aware about the broad range of service they offer. As an example, when the field work for this study was commencing, I was explaining my broad research interest to an engineer working in the Water business line. When I mentioned my interest in Corgan’s attempt to offer non-traditional services such as management consulting, he remarked, visibly surprised: “we do management consulting?” Along the same lines, one professional who works on the sales strategy for Advisory Services pointed out that they are “Corgan’s best kept secret”. Consequently, professionals acknowledged that selling Advisory Services “requires the Advisory people to almost market internally”. This is done by organising internal road shows or informal presentations where professionals would introduce themselves and the services they offer. However, many acknowledged that the impact of those attempts is quite limited because professionals in other business lines lacked the understanding of how those particular services are relevant to their clients:

The understanding thing is more unique to the advisory space because engineers are all about the built environment, and you know civil engineers understand what mechanical engineers do in principle and likewise; and they understand the principles around civil. So it's easy for them to sell that. But change management and organisational change is a bit harder for engineers to understand exactly why it's important and how to sell it.

What proved to be more fruitful is to “tell stories” of successfully delivered Advisory projects, actors usually referring to the aforementioned business improvement project at Auckland Airport and the real-world outcomes they resulted in. This also included efforts to translate the service descriptions into the specific language of the different market segments, as one professional reflects: “We made no progress at all in the Rail segment until we could credibly use their terminology.”

Apart from raising internal awareness, Thomas and others attempted to enhance Corgan’s “brand profile” for Advisory Services because most clients “consider Corgan an engineering firm, first and foremost”. Activities included the production of standard marketing material for the new services, or speaking engagements at conferences to introduce Advisory Services to clients and to graduates at University. Apart from that, isolated attempts through dedicated blog posts or public speeches to “position Corgan as a thought leader [who is] able to draw on massive breadth of expertise” were observed. In a public round-table discussion on the future of Auckland’s transport system, Thomas introduced Corgan as follows: “We are often called an engineering consultant, but we stopped being that 10 years ago [because] we offer a lot of non-engineering services; [for example] we no longer just build hospitals but show people how to run them.” This also involved the translation of service descriptions into “Big Four language” in order to use “common categories and terminology” that decision makers who typically buy those services are familiar with. Finally, Corgan’s new services also suffered from a lack of understanding from the firm’s insurance companies. While Corgan’s engineering services are usually covered by professional indemnity insurance that provide some protection from negligence claims, one Advisory professional pointed out that “we didn’t realise our insurers wouldn’t insure us for that work [Advisory Services]; ...because the insurers didn’t understand the service”.

7.3.2 Problematizing and aligning

Apart from fostering awareness and knowledge that facilitates the implementation of Leverage Everything, Thomas and others quite purposefully “challenged the thinking” of Corgan professionals in order to scrutinise “the Corgan way”. Yet, the alignment of Leverage Everything with collectively-held ideals of the engineering profession and the firm were also emphasised. Tactics included the problematisation of practices, the framing of Leverage

Everything as appropriate in the light of field-level dynamics and its alignment with individual identities and aspirations.

Problematising practices. One of the key messages that underpinned most events in relation to Leverage Everything was the depiction of existing practices as insufficient in the light of field-level disruptions. Presentations, for instance, on the “Future of Professional Services” usually ended with a slide that stated “What got us here, may not get us there, and may not even keep us here”. Although this also included commercial rationales, proponents of LE stressed that the focus on doing work and technical excellence leads to disgruntled clients and unsuccessful project proposals. In other words, while most professionals were guided by the belief that “the Corgan way” contributes to its success, actors deliberately challenged those assumptions. Most professionals were demonstrably proud to work for a firm that they considered the most prestigious in New Zealand and as highly valued by clients. However, Thomas introduced the firm in presentation slides as “Introducing Corgan: Hello my name is irrelevant”. To elaborate this point, he referred to his experience as a customer-relationship manager for Auckland’s local transport authority and how this client disliked Corgan. He uses the analogy of a person who enters a car dealership and wishes to buy a [cheap] Lada car but the salesperson argues:

No, what you need is a Corolla... because a Corolla is a more reliable, more technically correct solution; and [the client is saying]: no, no, no! I need a Lada. My boss has told be to buy a Lada. And then we [Corgan] will go away and we will produce a Corolla and bring it back...; and then we are really surprised when the client says: I never want to work with you again.

He then argues that he had to “break down this engineering mindset to become a consultant” in order to meet the client’s expectations:

Quality for [this client] is responsiveness and giving them what they want. It’s not the best engineering solution. And if you keep trying to force the best engineering solution on [the client] they give you the finger and hire AECOM.

Thomas also challenged the assumption, held by many engineers, that Corgan secures most of their new projects because of technical expertise and skills. In a conversation one engineer explained that they won the project “because we’ve done a good job on the previous work and

are not necessarily the cheapest". Thomas, who overheard this statement, got involved and the following conversation ensued:

[Thomas]: You are pretty cheap;

[Engineer]: We are not the cheapest;

[Thomas] I think you are;

[Engineer] Are we?

[Thomas]: Well our rates with [this client] are one of the lowest; You guys are really cheap. You do not understand how cheap you are!

This episode might seem insignificant, but it visibly troubled the engineer to learn that they had been awarded a new project predominantly because the firm offered the cheapest price. Essentially, problematising undemined deeply-held assumptions that inputs such as "hard work", "being busy" in terms of high productivity or "technical excellence", do inevitably result in outcomes such as profit, client satisfaction, winning additional projects or even firm survival. By introducing, for example, profitability as a "dimension for success" that is normally overlooked at Corgan, existing practices were problematised from a 'commercial angle'. The "win work, do work, get paid" mantra that guided the firm for decades was reformulated on PowerPoint slides to "win work, do work, and slowly get out of business". In other instances, professionals referred to social events such as the regular Monday Morning Meetings:

So you go to a Monday Morning Meeting and [everyone will go] we are an amazing company, you hear amazing stories. But if you are looking at your profit you go: hmm... Nothing happened.

Along the same lines, actors also challenged the relationship between technically superior solutions and firm survival. Thomas used the analogy of Nokia (the Finnish communications company that once dominated the mobile phone industry). In several events he argued that "Nokia were absolutely sure they had the best technology, they had the best people" and that "technical quality will continue to be their differentiator". He then claims that NOKIA underestimated emerging competitors like Samsung because of the assumption that "they [the competitors] just make rubbish phones", before noting that

there is a lesson in there for Corgan. We are a very successful organisation so what we need to do is to look when we make decisions and make sure we are not biasing our decisions too much on what's been successful in the past.

In order to problematise Corgan's predominant "way of doing things", Thomas spends a significant amount of time on YouTube or Google's image search to find videos or pictures that he can use to illustrate his arguments. He uses, for instance, a video (Ignatius/Stop Rowing, 2006) of a world-class rowing team who crashes into a pole during a competition despite the coxswain shouting "stop rowing" constantly. During his daily work, Thomas uses the expression "[Corgan] stop rowing!" often to point out that just paddling harder, in terms of increased productivity, has its downfalls. Apart from this and other videos, the three cartoons illustrated in Figure 7.3 often feature in presentations. They are similarly used to problematise Corgan's alleged risk-adversity in the face of new ventures, the dominance of productivity and the assumed automatic relationship between winning new projects and increasing Corgan's profits.



Figure 7.3: Cartoons that problematise the dominant practices

These cartoons might seem a simple device to include some humour in a presentation, but they accentuate shortcomings of the dominant practices in quite provocative ways. In one presentation to high-level Corgan employees he introduces the cartoons as follows:

This is supposed to be funny [...] everyone goes 'hahahah'. How ridiculous. I think that's Corgan's business model. This is ridiculous. This is really good when you are in a stable market and things haven't changed for 90 years. All you have to do is keep doing more of what you do. Increase our sales. And increase productivity.

In other presentations, professionals used an Excel model that demonstrated how a change in productivity rates had very little impact on the profitability of business lines. They also utilised catchy analogies and labels to problematise "the Corgan way". Some of those are now used by a wider range of actors to describe shortcomings of the existing model. Examples are Corgan's "pursuit mentality" that is based on a "win more fallacy" or the firm's "hero culture" that relies too much on individuals who perceive to wear "magic shoes".

Framing field-level changes. Aside from much effort to problematise existing practices, actors also framed field-level changes as an opportunity and undermined the expertise and knowledge claims of competitors. This usually entailed the message that clients nowadays demand a "more integrated service offering" as the world is "getting way more complex" and "people are faced with complex challenges". This enabled professionals to frame Leverage Everything as an opportunity to be "integrators of complexity" because engineers in general and Corgan in particular are "great in dealing with complexity". It was argued similarly that emergent technology such as Big Data "favours people with intuition, experience and judgement [...] just like us". Thus, Leverage Everything is presented in term of ongoing "services for complex assets" where clients require a broad range of engineering skills but also "someone who understands business decisions". Leverage Everything was essentially portrayed as a moral obligation to clients and society as existing firms, the Big Four, fail to address increasingly complex problems in a compelling way. It was argued that clients "do not want that service [provided by the Big Four] anymore" because they "spend three million in three months and receive a power point pack which is probably quite similar to the last one they've produced". Along the same lines, professionals claimed repeatedly that "clients are

becoming less interested in paying a lot [for management consulting services]. They want physical results, physical money saved". New services were framed in the light of their "wider reaching implications on society" as incumbent firms and governmental organisation fail to address demographic shifts: "Corgan has an opportunity to save 100 lives annually; to improve the level of patient care and reduce the level of patient harm in NZ and globally". On other occasions, informants tried to create a sense of 'being ripped off' by the Big Four whenever they partner on particular projects. In doing so, they portray Leverage Everything as a means to address injustice and inequality in the field.

Aligning identities. Aligning identities refers more to individual aspirations in a more complex environment. Informants spoke of "changing the mind set" of others in order to craft an identity that incorporates traditional engineering values with a 'commercial bent'. As argued in this thesis, one key element that characterises the identity of engineers is that of practical solutions embodied in tangible artefacts. These elements also featured significantly in the portrayal of the "future Corgan consultant" as envisioned by proponents of Leverage Everything. The ability to offer "hands-on advice", "being boots on the ground", helping "clients to fix problems" or producing "real-world outcomes" was emphasised consistently. Those abilities were portrayed, however, as insufficient for delivering "value add" to clients and for their careers within Corgan. Actors organised presentations on "The future of PSFs & your career" to graduates. During these presentations, they argued that future engineers will not only be technically excellent, but have a broader understanding of the client's business and be able to "contribute outside of [their] technical role". In another presentations it was argued that most graduates probably think that they will "design really cool bridges" but Corgan is "not gonna have 400 bridge gurus" in the future. Thus, he highlights the need for them to "bring a much broader offering to a client", to work on their "soft consulting skills" and their "business acumen".

7.3.3 Recruiting, empowering and demonstrating support

While the strategies outlined above are of a rhetorical nature essentially denoting attempts to demonstrate shortcomings of existing ways, and the moral and pragmatic superiority of alternative ideas, other efforts refer to establishing more unified support for the alternative business model. Reflecting on this, Thomas acknowledges deliberate efforts to identify and

line up others “who absolutely get” the Leverage Everything concept and to facilitate their social interactions. The tactics involved can be described as recruitment and clustering of actors.

Recruitment. In its simplest form, recruitment refers to the construction of networks with decision makers in client organisations who would typically buy Advisory Services. Thomas, for instance, made himself head of the INSEAD alumni association to build CEO and CFO networks. He also uses social media such as LinkedIn to identify potential supporters in client organisations. In his daily interactions, he refers to those networks and the alleged support from clients “who aren’t getting what they want in terms of their asset management” and who agree with him that Corgan is on “the escalators of success with that approach [Leverage Everything]”. In several meetings, informants encouraged other professionals to not only “build your network around people related to your profession”. As a key advocate of diversity within Corgan, Thomas also continuously accentuates the need to ensure that Corgan “has a continual infusion of new perspectives”. He actively promoted the hire of former Big Four partners for Advisory Services, external consultants to infuse “best practice into Corgan”, and graduates with non-engineering degrees. While external hires with non-engineering backgrounds indeed happened, the majority of professionals working in Advisory Services were recruited from the more traditional Corgan business lines. Discussing the approach to identify those, one informant reflects:

There are a subset of people who work in the engineering part of the business who are actually really well suited for Advisory [...] and we tell that because they get sick of design after about two years and go: I do not want to do this anymore. Because it's repetitive, it's detailed. And so our current strategy is to bring those people across and grow that Advisory business. But it's a very slow way of doing it.

Although recruiting and demonstrating external support is noteworthy, the key aspect of recruitment are deliberate efforts to identify and socialise ‘malleable Corgan professionals’. For instance, Thomas not only posts on social networks to promote alternative ideas. He also constantly keeps tracks of ‘likes’ and comments on those posts. By doing so, he can locate professionals (usually junior employees and new recruits) who are more open or receptive to

alternative ideas. Extending his job description, Thomas meets on a regular basis with those 'like-minded' professionals to "bounce ideas off" and to "empower them". In those meetings, which can be described as quite unstructured mentoring, Thomas discusses emerging issues and challenges that professionals face, but also perceived shortcomings of the current business model. The opportunity to discuss non-engineering related issues is very much valued by the younger employees as one of them points out: "[this is] not a traditional thing at Corgan because very rarely would you grab a coffee with someone like a director and they would just have a chat with you with no agenda of doing project work". It is seen that Corgan does not offer much support to professionals who are interested in "more than designing bridges". Mentoring such professionals ensures that capable professionals do not leave the firm because their non-engineering interests are not being honoured. Thomas also continuously encouraged Corgan professionals to do MBA or similar programmes, for instance, by presenting on his INSEAD education and the transformational impact it had on him. He also identified all Corgan professionals who are doing an MBA at the moment and supports them throughout the process. Those professionals who had some sort of mentor relationship with Thomas appeared in the course of data collection, to be very supportive of Leverage Everything; they considered themselves, just like Thomas, as distinctly different to other Corgan professionals.

Clustering. In addition to the purposeful identification and recruitment of professionals who were more inclined towards Leverage Everything from the outset, their organisational and physical separation created more unified support. Indeed, a member of the leadership team acknowledged that establishing Advisory Services as a separate business line "created some kind of critical mass" that was deemed necessary to promote Leverage Everything. Apart from a dedicated financial budget and performance goals, this also contributed to the collective socialisation of like-minded professionals. Clustering professionals who delivered non-traditional services and who had broader interests and educational backgrounds than their engineering colleagues enabled them to discuss problems that they collectively face and discuss solutions. Professionals set up groups on social media to exchange ideas, share successes stories, or to problematise shortcomings of "the Corgan way". Those within Advisory Services also developed strong social bonds, and a fortnightly New Service Workshop was established for them; notably those workshops evoked a notion

of distinctiveness to traditional business lines, and uniformity in the portrayal of barriers they encountered. Participants would share stories about engineers who make 'ridiculous' financial decisions, evoke stereotypes that characterise the typical engineer, or discuss ways to break "the engineering mindset". Professionals who participated collectively agreed on the main barrier to the realisation of their aspirations: the stereotypical engineer "who 'doesn't get it'". The examples and problems discussed in those workshops were endlessly repeated. Customer relationship managers (CRMs) who encumber the success of Advisory Service professionals were, for instance, mentioned in almost every workshop. Yet, CRMs or staff members from the traditional business lines were not invited to any of those meetings.

7.3.4 Entrenchment in practice

Despite all the efforts to promote Leverage Everything to a wider audience, Thomas and others acknowledge that "change is much harder than expected". Despite professionals generally demonstrating some kind of awareness and reflexivity, fundamental social practices and organisational processes remained unchanged. As Thomas reflected in one of the final interviews with him: "there is the awareness there but no immediate action". Thomas and others began to tackle the problems they face in more substantive ways. The tactics involved can be described as routinisation of Leverage Everything in organisational processes and the embedding of actors through conscious re-location.

Routinisation. While existing firmwide KPIs such as productivity are increasingly recognised as problematic, they still dominate the daily work of Corgan: professionals are still rewarded and penalised based on productivity reports. Individuals remarked that the identification of cross-selling opportunities or collaboration with other business lines had less impact on their performance evaluation: because "you have to force people through KPIs or whatever to cross-sell [because] it doesn't come naturally" Thomas and a member of the executive team spent a significant amount of time on developing a new performance measurement system so people were not "being measured just on productivity". This new system was not implemented before data collection was complete. The performance measurement system incorporated many elements that are reflective of the Leverage Everything model. It differentiates, for example, between sales and delivery at the individual and the section level. It also incentivises profit maximisation on projects, the deliberate

leveraging of resources, collaboration and cross-selling between business lines. At the same time, efforts were made to adjust the firm's IT systems, to better reflect the Leverage Everything rationale of ongoing services. Finally, new roles were created to promote Advisory Services to a wider audience and to facilitate collaboration between traditional and non-traditional actors. A "shadow CRM" initiative was implemented where Advisory Services professionals would meet on a regular basis with CRMs and accompany them at client meetings to identify potential opportunities. Those initiatives were, however, usually short term, resulting in limited interactions between professionals. Thomas acknowledges that a certain "awareness is there but you do not see CRMs going around selling Advisory Services". Reflecting on the underlying issues, he goes on: "education is easy but you [do not] create a better relationship by having a meeting with someone and talk about what you can do for them; ...it needs to be more than that".

Embedding of actors. In saying "more than that", what was meant were the prolonged interactions and physical proximity of actors. Over time, some professionals realised that their organisational separation (in the Advisory Services business line) and spatial separation (in the locations within the Corgan building) constitute a significant barrier for collaboration. In some instances, they were able to cross that divide by embedding themselves in traditional business lines. Speaking about this, Thomas reflects that he is "now a big fan of co-location because if you want to work with Industrial, well then go and sit in Industrial". He goes on to recall the story of one Advisory Services professional:

So what he did is he sat in Advisory and talked to all the other business lines. And he did a good job but he got nowhere. So what he did is he embedded himself in industrial. So he walked... picked up all his kit, I remember he used to sit over there; now he sits over there. So he jumped himself in the middle of Industrial and now he's got great opportunities. In Industrial.

Finally, most Advisory Services professionals acknowledged that "road shows and presentations can highlight some awareness" but breaking "this invisible line between us" requires "doing work and having some spectacular successes". However, while joint work on projects, "leading by example" and demonstrating success emerged as a key theme for embedding Advisory Services in the daily work at Corgan, it was also acknowledged that this

is “a very slow process” and often the short-term, small nature of Advisory Services projects doesn’t increase credibility amongst professionals who value “big things” and “large wins”.

7.3.5 Section summary

This section addressed the second research questions and showed how embedded actors promoted a salient alternative logic within their organisation, simultaneously challenging assumptions and normative criteria stemming from the firm’s dominant logic. In essence, the tactics presented here constitute purposeful efforts to enable and encourage a sufficient number of others to draw upon the alternative engineering-advisory logic. Table 7.2 summarises the descriptive findings presented in this section based on the theoretical core concepts that will be discussed in the next chapter: Cognitive praxis refers to hybridisation of knowledge and attempts to increase professionals’ awareness of market dynamics and alternative modes of organising (Greenwood & Suddaby, 2006). Sense-giving praxis denotes purposeful attempts to emphasise contradictions and shortcomings of the current business model and the justification of the alternative, as normatively appropriate (Greenwood & Suddaby, 2006; Seo & Creed, 2002). Socio-political praxis refers to empirical themes around creating unified support amongst actors through mentoring and organisational separation (Seo & Creed, 2002; Smets, Morris, & Greenwood, 2012). Finally, socio-material praxis are coordinated attempts to substantially infuse the alternative logic into the daily work of professionals (Lawrence & Suddaby, 2006).

Core Concepts	Ends	Means	Tools and Artefacts	Emotions evoked
<i>Cognitive praxis: Educating the business (and the client)</i>				
Sensitizing	Creating awareness of field-level dynamics	Presentation; Labelling threat (“Professional services war”)	Animated slides; Pictures to personalise threat; Social media to spread message	Fear (“the guy from my nightmares”), danger (“dark storm clouds”), uncertainty
Theorizing	Introducing LE as a solution and emphasising commercial viability	Introducing management concepts; Labelling alternative ideas	Slides that show competitors strategies; Links to case studies; Excel Models	Hope (“we know what to do”); logic and scientific soundness; urgency
Educating	Building knowledge and skills to support LE; Creating awareness of services	Internal trainings; Translation of concepts; Internal and external marketing	Marketing material, internal hand-outs; Business war games; Online quizzes	
<i>Sense-giving praxis: Problematizing and aligning</i>				
Problematizing	Demonstrating shortcomings of “the Corgan way”	Visualising and labelling shortcomings; analogies and metaphors;	Cartoons and YouTube videos; Excel models;	Ridiculing; joking; confusion; inherent contradictions
Framing	Portraying field-level changes as an opportunity and LE as a moral obligation	Undermining expertise of Big Four; Emphasising benefits in the light of societal changes		Moral duty; serving society; addressing injustice
Identity alignment	Alignment of LE with individual identities.	Emphasising benefits for individuals		Support; individual potential; differentiation from others
<i>Socio-political praxis: Recruiting, empowering and demonstrating support)</i>				
Recruitment	Identification of ‘malleable’ professionals	Mentoring, Promoting diversity	Social media to identify supporters; Networking events;	Distinctiveness
Clustering	Physical and organisational separation	New business line, regular meetings; Informal networks; KPIs	Social media groups; separate physical space	Collectivity and unity
<i>Socio-material praxis: Entrenchment in practice</i>				
Routinisation	Adjusting KPIs and IT systems; creating new roles	Implementing tools to monitor compliance with LE		Personal rewards
Embedding	Conscious re-location of actors; prolonged collaboration	Physical re-location; demonstrating pragmatic benefits		Trust; Mutual benefits

Table 7.2: Summary of actors practical work

7.4. A focus on consequences: Quo vadis Corgan?

The previous section has focused on the practical work of individuals in promoting Leverage Everything. This third, and final, section presents the outcome of the strategies and tactics adopted by actors, and shows to what extent they resulted in persistence or change. In doing so, this section answers the third research question:

RQ3: What are the consequences of the actors' micro level efforts to promote an alternative logic within their organisation?

Viewed from afar, the establishment of the new Advisory Service business line, the hire of non-engineering professionals, or the consistent portrayal of Corgan as a "professional service firm and not an engineering firm" would indicate the emergence of a hybrid logic within the firm (see Heinze & Weber, 2016). Insights gained from the ethnographic fieldwork, however, suggest that these surface elements warrant a more nuanced discussion. First, despite consistent references to Corgan as the "Number five in the Big Four" and unified rhetorical support for Leverage Everything, fundamental practices and identities remained largely unchanged; symbolic elements of the alternative logic were assimilated by the dominant logic. Efforts to create awareness of alternatives, to problematize existing practices, and the purposeful identification and separation of members supportive of alternative ideas, infused a sense of distinctiveness and barriers for collaboration. In some instance, however, professionals were indeed able to overcome this separation through ongoing collaborative work and purposeful re-location.

7.4.1 Assimilation: Number five in the Big Four?

While the notion of two competing logics and actors might indicate an inherent conflict between the two business models, it has to be mentioned that, at least on the surface, most employees and the leadership team seem to advocate and support the strategic shift towards Leverage Everything. This is reflected in the CEO's belief that:

We are a professional services firm with a practical bent [...] that is his mantra at the moment [...] he gets very angry when he hears anyone from the Big Four saying that they are the four biggest professional services firms in New Zealand. Because he sees Corgan as a professional services firm and not an engineering one.

Other professionals throughout the firm similarly echoed claimed that Corgan is “the number five in the Big Four” or that “Corgan is disrupting the Big Four in the advisory services realm”. The firm even removed the word ‘engineering’ from its logo and its homepage. Along the same lines, informants, especially on higher organisational levels, emphasised the firm’s increased focus on non-traditional services, all the intended initiatives to promote Advisory Services or shared stories of successfully delivered management consulting projects. Only on occasional instances did professionals challenge the general rationale that underpins Leverage Everything; for instance, by proclaiming that “we are not McDonalds. We are not supposed to ask: Do you want fries with that?”. Recruitment of non-engineering professionals and the establishment of the Advisory Services business line, was consistently framed as a quite radical departure from Corgan’s current model. Corgan even hired a former Big Four partner to facilitate the growth of Advisory Services. This had been suggested by proponents of Leverage Everything for a long time, but internal resistance and financial considerations slowed down the process. As foreshadowed, however, this does not signify that Leverage Everything is actually ‘lived’ at Corgan. One member of the leadership team reflects on this separation between mostly rhetorical endorsement and implementation quite tellingly:

So I think the awareness has improved, I think the understanding of the need to cross sell and have an Advisory offering for clients is much better accepted than it was and it’s reflected in the business plan. The challenge is then to follow through on that. Because there is a leap from, you know, I’ve got the aspiration to actually how do I do that!

In many ways, most professionals at Corgan continue to draw on the dominant professional-engineering logic in their daily work. Advisory Services, for instance, operates in relative isolation from other business lines. While cross-selling and collaboration is a key element of Leverage Everything, professionals who deliver the non-traditional services acknowledge the challenges of breaking “into the old boys club” of long established networks within the firm and industry. Most projects delivered by Advisory Services did not emerge from opportunities identified by other business lines; conversely, non-traditional projects rarely resulted in additional work for the engineering divisions. Despite marketing material and some professionals proclaiming that Corgan delivers services such as “strategic business consulting” or “change management”, most Advisory Services projects refer to some kind of

small scale, visualisation or process optimisation. The separation between sales and delivery and a purposeful leverage of senior expertise, remains the exception. One professional who was hired to define and grow some of the non-traditional services remarked that he was singlehandedly responsible for “pre-sales, delivery, job management, and business development.”

Despite all the rhetorical support from the firm’s senior management, the investment in new services remains contested. Professionals remarked that more pro-active marketing efforts such as speaking at conferences are regarded as “going on a junket” by other professionals. Others added that “a lot of these new services do not have the fundamental things behind them that they need. Everything from marketing material to web presence”. Reflecting on this, Thomas agrees that still “all the resources are going into bid [for new projects]. Business as usual you know... work the mill harder”. A general theme that emerged during data collection is consequently a perceived lack of organisational support for professionals who are supposed to grow and deliver Advisory Services. This is quite tellingly illustrated by a conversation with one professional who conducted one of the projects that was habitually mentioned as a ‘success story’ for non-traditional services. Speaking about the firm level support for non-traditional services, the professional sighed, said “zero!” and laughed in a resigning way before adding “None, none!”. While the non-traditional services suffer from a lack of investment, considerable more prominence is put on reducing the costs of delivering traditional services through automation and global work sharing. Reflecting on this observation, one participant argues that “[most of Corgan’s executives] were trained in the design business. So they are very happy to invest in making the business more efficient. They understand that entirely; if you can get cheaper than that's great”.

Organisational processes and systems remain very much centred on productivity and complex infrastructure projects. Several Advisory Services professionals recount instances where they had to justify themselves for their low productivity rates, even though the actual profitability of their projects was much higher than in traditional engineering projects: “His rate is like 150% of the standard [engineering] rates [but] it doesn't matter what his charge out rate is but he gets beaten up on productivity”. Similarly, Advisory Services professionals are encumbered by “all those processes that were designed for large infrastructure projects” but that do not reflect the nature of the work (e.g., short term, small projects) they are doing.

Collaboration between business lines is undermined by the firm's focus on productivity; as one Advisory professional remarked: "everyone is focused on productivity... so why would I spend time going to talk to [this other business line] when it's just a red mark on my time sheet". Professionals also emphasised repeatedly that they are expected to sell Advisory Services to existing Corgan clients with a substantial discount aligning with the rates for engineering services. In other words, they were unable to charge higher rates to Corgan's existing clients because of internal resistance, despite the fact that the client would have paid them.

Furthermore, although some professionals with non-engineering backgrounds were hired, recruitment and promotional practices, by and large, reward conformity. Professionals would assert that "our leadership is very male, very in their fifties and they come from traditional [engineering] backgrounds". Even new recruits with non-traditional backgrounds often embodied the focus on hard work and technical expertise, at the same time lacking the skills or ambitions to make the non-traditional services commercially successful or to grow the services. One member of the leadership agrees when he reflects:

Yeah, I think what we are seeing is, if we are going to bring senior consultants in; they've got to be a complete consultant. And I think, [those people that we recruited] do not necessarily have all the bits. They might have the relationships, they might have the domain experience but they do not necessarily have the commercial acumen of a consultant.

Even professionals who sell and deliver Advisory Services often do not meet the client's expectation towards management consultants. Professionals acknowledged that they "tend to get quite technical in their management consulting language" and "for some people that can be off-putting" because "we do not look like the Big Four, we do not smell like the Big Four and we do not feel like the Big Four". Speaking about this with Thomas, he agrees that "we are not aware of it so much but when you got an engineer coming to talk to you about stuff, the language is different, the approach is different, and they dress differently". Conversely, Advisory Services professionals contended to be perceived as "snake oil selling", "not real engineers", "secondclass citizens" and "only producing flow charts" by other business lines because of the nature of the services and the non-tangible output produced.

In summary, despite all the rhetorical support, the success stories told and the alleged benefits Leverage Everything offers for clients and firms, the alternative business model remains an envisioned one. The non-traditional services thus operate in relative isolation, struggle to be commercially successful, should meet productivity targets and had not really grown significantly since they were established in 2012. Collaboration and cross-selling between traditional and non-traditional services remains the exception and investments remain scarce. Senior professionals rationalised these issues by emphasising Corgan's current problems in the Australian and Chinese market that "get all the attention". Others claimed that more deliberate marketing for non-traditional services would enhance the likelihood that Advisory Services professionals get poached by Big Four firms, whereas, others blamed the employee-shareholding model:

That's because the company is run by really senior people who are within the 10 year window of leaving. Why would they... you know they just wanna squeeze the last out of what they can before they retire and then they go away.

In the same vein, professionals developed shared explanations as to why many clients still hire the Big Four despite all the presumed advantages Corgan has to offer. The statement that "no one ever got fired from hiring PwC" was heard five times during the fieldwork. For all these reasons, a significant amount of frustration amongst proponents of the alternative business model was visible. External hires resigned due to a proclaimed lack of support, and some younger professionals who were mentored by Thomas took up roles with management consulting firms.

7.4.2 Separation: They just don't get it

The problematizing of existing practices and the organisational separation of Advisory Services professionals gave rise to a collective identity based on their 'distinctiveness'. This was especially appeared in the regular New Service workshops where they discussed all the challenges they face. Professionals in those meetings constitutively identified engineers in the traditional business lines as the main barrier for their success. For instance, they developed a common language and referred to such actors as "Corgan blockers". Similarly, they constantly referred to a distinction between "us" and "the rest of Corgan" and the distinctiveness of the non-traditional services: "we are selling a unique and valuable service and they are used to

delivering commodity engineering". They evoked a stereotypical portrayal of engineers as socially awkward geeks: "in some of the traditional areas you are dealing with a lot of [ahm] people that do not like other people [laughter]. It's true". Also, the challenges Advisory Services faced were often blamed on engineers "who don't understand the services we offer" and who lack the evoked commercial acumen. In several meetings a story of engineers who made ridiculous financial decisions was told to amused Advisory professionals. Participants also unanimously referred to the firm's focus on productivity or its "hero culture" as a main barrier to growing Advisory Services, and referred to Nokia's or Kodak's downfall as similar to Corgan's current situations.

Although Thomas did not take part in those meetings, other actors drew the stories, examples, analogies and metaphors to rationalise and justify the challenges they face; Most barriers Advisory Services professionals mentioned were already mentioned in presentations that Thomas and others organised to promote Leverage Everything at the outset (three years before fieldwork commenced). In response to all the real and perceived challenges, professionals who work in non-traditional services either leave the firm in frustration, or have collectively settled on the explanation that "the Corgan way" and "the traditional business lines" are at fault. In this context, Thomas mentions that "everyone at Corgan who did an MBA left the firm within six months". He goes on to argue that "that's because they find when they are opened up to how the world of business works they are just like so frustrated here because they can't make any change". While Thomas is referring to professionals who are doing a MBA degree, efforts to promote Leverage Everything had indeed "opened up" others within the firm to alternative ideas. Those efforts also equipped them with stories, metaphors or explanations to justify their otherness and the barriers they face. Increasingly, they recognised their distinctiveness based on their broader educational background, the type of services they offered, their ability "to see the broader picture" or their "commercial acumen". Yet, this self-image as 'different' was significantly shaped by the efforts to promote the Leverage Everything idea that were outlined in section 7.3.

7.4.3 Integration: Working together

As indicated throughout this chapter, there were occasions when professionals were able, using their own initiative, to disrupt barriers between Advisory and "the rest of Corgan" by

physically relocating their work space” to embed themselves within the engineering business. This importance of locational proximity was echoed in several conversations: “In professional services firms, it’s hard to introduce new services unless people are physically somehow – at least through a P&L [profit and loss]—connected”. In another talk he would reflect: And that’s what we got wrong; ...So perhaps that’s the Holy Grail, how do you get [professionals] to be embedded with the business”. Along the same lines, several Advisory professionals remarked that “real success in doing this is work together. Do projects together, that’s where you learn from another and you start building relationships”. The same can be said of the client’s perceptions, since some started to see Corgan “not just as an engineering firm” but as “a professional services firms that just happened to do engineering”. This is especially true for projects related to the NZ Defence Force where a close relationship has been established for decades and a significant number of former defence personal now works for Corgan. For instance, in one conference this client introduced Corgan as “our strategic partner” alongside “PwC and Deloitte”. However, integration takes a long time of working together on solving problems and to produce outcomes that demonstrate the benefits of the Leverage Everything rational for individuals, the firm and its clients.

7.5. Section summary

Table 7.3 summarises the observed consequences that emerged from the practical efforts to promote Leverage Everything. Assimilation of logics, the first observed consequence, emerged from the purposeful efforts to infuse alternative ideas into the organisation and to challenge the dominant logic guiding the firm. However, although actors increasingly drew upon the salient engineering-advisory logic (see Table 6.3) in the language employed organisational processes, practices and individual identities remained anchored in the dominant professional-engineering logic. Separation, the second observed consequence, emerged from the structural segregation of Advisory Services professionals from others. Through frequent interaction and purposeful mentoring, professionals increasingly developed a sense of distinction based on their ability to draw upon the alternative logic. Integration, the third observed consequence, emerged where the alternative logic was repeatedly enacted by a wider group of actors in response to localised challenges faced in their daily work.

	Assimilation	Separation	Integration
<i>Elements reflective of dominant Logic</i>	No separation between sales and delivery; Productivity is still the dominant KPI; non-engineering professionals are technical experts (and lack commercial acumen); more investment in efficiency of traditional services than in growing non-traditional services	Evoked by professionals in Advisory Services to justify and rationalise the barriers they face.	
<i>Elements reflective of alternative logic</i>	Mainly symbolical and rhetorical. Increased awareness and proclaimed support for Leverage Everything; Establishment of Advisory Services; recruitment of non-engineers;	Professionals in Advisory Services developed a common understanding of distinctiveness that is based on elements of Leverage Everything	Actual hybrid logic emerges in some instances where elements of both logics are integrated in the daily work of professionals, maintained through ongoing collaboration and enforced by organisational routines
<i>Consequences</i>	Advisory Services relatively unprofitable, no significant growth, rationalisation; frustration and resignation of professionals	Shared identity and language develops in Advisory Service; increased barriers between business lines; professionals leave the firm	Corgan seen as strategic advisor by clients; cross-selling and collaboration of traditional and non-traditional services;

Table 7.3: Summary of observed consequences

7.6. Chapter summary

This chapter offered nuanced insights into the efforts of professionals in promoting an alternative institutional logic (Leverage Everything) within Corgan. By demonstrating past achievements and sensitising actors to field level changes the institutional intrapreneur was able to position himself as a key actor. By emphasising his non-engineering education and interest he introduced alternative ideas into the organisation. His in-depth understanding of the firm's history and practices also enabled him to problematise existing practices and to align alternative ideas with collective values. The purposeful identification of 'like-minded' professionals, socialisation through mentoring and organisational separation in a business unit created more unified support. Yet, despite the alternative business model (Leverage Everything) being endorsed by most informants, the processes and practices within the firm remained unchanged. Some staff members, furthermore, began to develop a perception of distinctiveness that reflected Thomas's self-portrayal as a dissident. In other words, those professionals evoked their assumed differences to rationalise the problems they encountered. They continued to appropriate metaphors, analogies and stories that Thomas and others

introduced into the organisation. Whereas such rhetorical devices were initially used to problematize practices, professionals began to use them to justify the barriers they encounter. In other words, while the sets of tactics discussed in 7.3. sought to promote an integration between traditional and non-traditional services, the effect was almost the opposite. Only in cases where professionals worked together on joint projects over a prolonged period of time, and in physical proximity, hybrid practices began to emerge.

CHAPTER 8: Discussion | Alternative Logics in Praxis

8.1. Aim of the chapter

This chapter establishes a dialog between the findings and extant theory to demonstrate how the empirical data resonates with existing institutional theory, but also to what extent it increases and challenges the current understanding of the studied phenomena. The chapter moves accordingly from the observations described in the previous chapters to theoretical categories emerging through a constant interplay between data, theory and analysis (Suddaby, 2006). The first section distinguishes between two groups of actors to facilitate the subsequent discussion. The next section portrays the main actor's social position as a practical accomplishment facilitated by the exploitation of the different logics at play. Moving to the praxis of actors, the discussion identifies four main forms—socio-material, political, sense-giving and cognitive—upon which actors draw. Finally, this thesis distinguishes between three forms of outcomes—assimilation, integration and amplified separation of logics—that emerged from the dynamic interplay of micro level efforts.

8.2. Actors of maintenance and change

Instead of portraying organisations as unified actors, this research shows that some individuals, although embedded in the same organisation-as-field, might be more receptive to alternative ideas than others (Empson et al., 2013; Battilana & D'Aunno, 2009). Along the same lines, Greenwood and Hinings (1996, p. 1036) speak of “patterns of value commitments” that distinguish actors within any given field. At Corgan, the two groups can be described as ‘incumbents’ and ‘challengers’, depending on their “pre-existing attachments” (Smets, Morris, & Greenwood, 2012, p. 896) to the dominant logic (see Fligstein, 1997). While incumbents enact the dominant logic in their daily work practices, challengers go along with the rules of the game but are more inclined to draw upon the alternative (hybrid) logic (Battilana et al., 2009). Hills et al. (2013) similarly differentiate between the merely ceremonial adherence to a dominant logic and the full internalisation “into actors’ thoughts, feelings and actions” (p. 130). Incumbents embody the social role of insiders whose “identities are formed through near total immersion in specific social worlds” (Unruh, 1979, p. 120). They have built relationships with other insiders over a long period of time, both within and outside the organisation. They share a disposition towards the material world but also a common

trajectory through engineering schools and their professional careers (Spence & Carter, 2014). Incumbents engage in predominantly ‘iterational’ forms of agency that are directed towards the past and habitually reproduce the dominant logic without much reflection (Emirbayer & Mische, 1998; Seo & Creed, 2002).

Challengers can be described, contrast, as regulars in the organisation-as-field. They “have made participation in a social world a regularized and routine activity” (Unruh, 1979, p. 119). Challengers differ from incumbents, however, as they have not fully internalised the dominant logic into their professional habitus (Hills et al., 2013). Their dispositions and their subsequent educational and organisational trajectories are dissimilar to the dominant incumbent group. As discussed in section 6.5, many individuals working in Advisory Services had, despite holding formal engineering degrees, acquired broader sets of skills and knowledge through non-engineering education and more diverse professional careers. Pache and Santos (2013b) speak of individuals who can identify with two logics and are therefore more likely and able to combine them in their daily work. Pache and Santos (2013b, p. 26) mention explicitly that such individuals may have “dual degrees [or] extensive cross sectoral experience”. Within Corgan, such individuals were able to demonstrate some conformity with the dominant logic; Yet their slightly different habitus, emerging from different educational and career histories as well as from their personal interests, made them more reflective of the dominant logic and more open for transformative action (Emirbayer & Johnson, 2008; Mouzelis, 2007; Suddaby et al., 2016). They typically possess less social and cultural capital, due to their lower hierarchical positions and shorter work experience within the organisation. Their agency is thus more practical-evaluative and oriented towards the present demands of the organisation-as-field (Emirbayer & Mische, 1998; Smets & Jarzabkowski, 2013). Table 8.1 contrasts the two groups of actors and lays the foundation for the remainder of this chapter.

	Incumbents	Challengers
Internalisation of dominant logic	Full	Ceremonial
Social role	Insider	Regular
Capital	High	Low
Agency	Iterational	Practical-evaluative

Table 8.1: Differences between challengers and incumbents

The very existence of challenger actors with heterogeneous interest within an organisation is, however, insufficient for transformative change if a dominant group is committed to the existing practices (Garud et al., 2007). To shift their practical-evaluative agency into a more projective one is dependent on the skills and strategies of intrapreneurial actors (Emirbayer & Mische, 1998; Goldstone & Useem, 2012; Perkmann & Spicer, 2008; Seo & Creed, 2002). The next section discusses how Thomas Yorke, the institutional intrapreneur in the focus of this study, was able to construct a social position that enabled him to promote alternative ideas within Corgan. This section shows that an enabling position is itself built on praxis and thus on the purposeful exploitation of the institutional logics at play.

8.3. Social position in praxis

The first research question sought to understand:

RQ₁: How do individual actors construct a social position that enables them to challenge a firm's dominant logic and to promote an alternative one?

In answering this question, this research conceptualises an enabling social position as a skilful accomplishment involving the mindful and creative enactment of the dynamic tension between institutional logics (see Spee, Jarzabkowski, & Smets, 2016). Below, I theorise three core sets of praxis: confirmative, bridging and segregating. Individuals draw upon these to demonstrate and enhance different forms of capital. Figure 8.1 integrates these into a conceptual model distinguishing between three relative social positions: committed regular, outsider or hybridiser. These differ in the respective enacted form of capital and the underpinning sources and types of legitimacy.

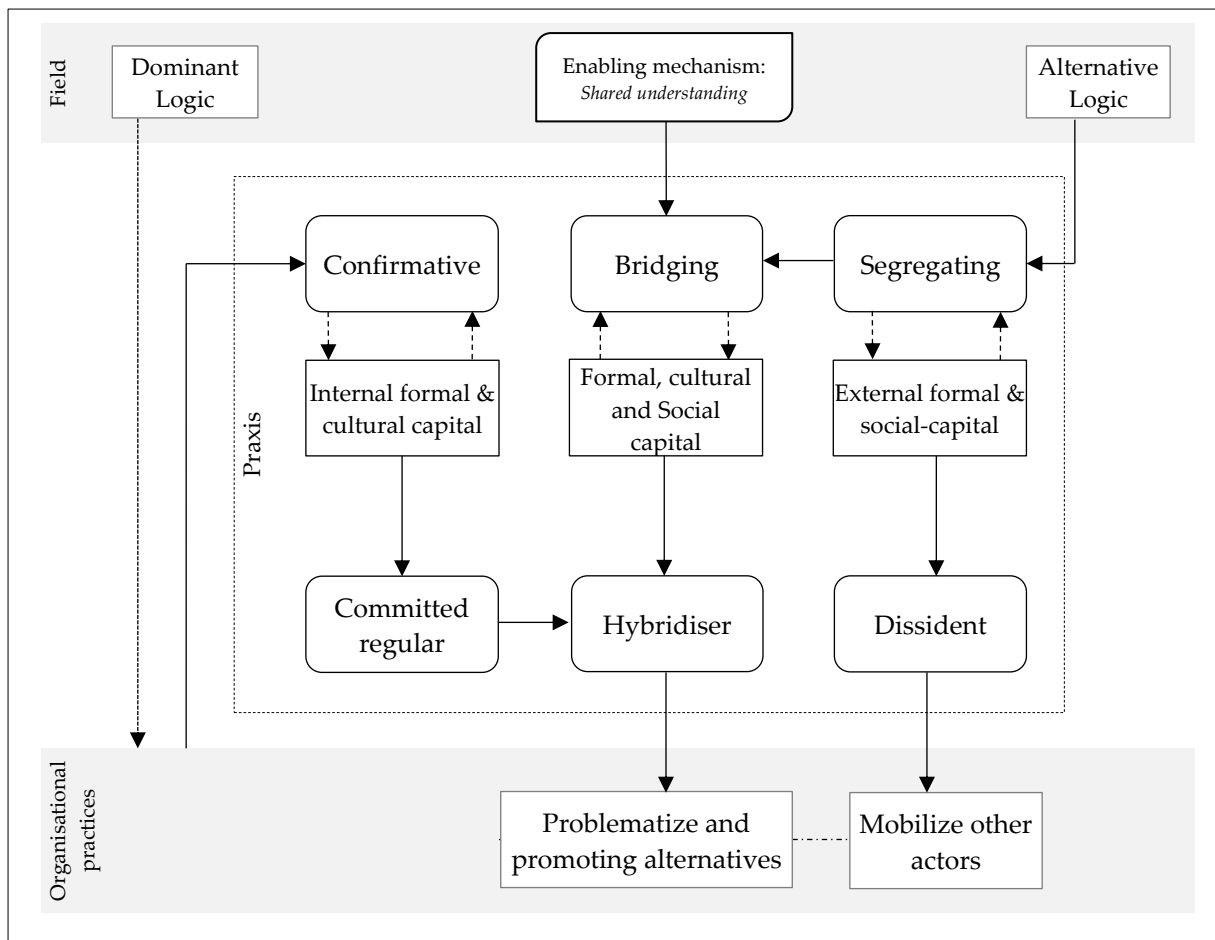


Figure 8.1: Social position in praxis

Building on the notion of nested institutional logics, Figure 8.1 depicts how organisational practices within Corgan reflect the practices of the organisational field. However, the purposeful introduction of a rival logic enabled the actor to identify and to problematise prevailing practices and get others to embrace the alternative. The remainder of this section elaborates the model, starting with the deliberate enactment of the dominant logic to demonstrate conformity but also the actor's efforts to position himself as different in the face of field level challenges. This section discusses how the actors' rhetorical skills to frame field level dynamics in combination with the skilful integration of both logics enabled him to introduce and promote an alternative logic that aligned more closely with his individual interests (Pache & Santos, 2013b).

8.3.1 Positioning as a committed regular

Although the institutional intrapreneur identified more with the alternative (hybrid) logic he still signals a sophisticated understanding and appreciation of the prevailing logic (Pache &

Santos, 2013b). By demonstrating cultural awareness in terms of a “familiarity with the culture of the dominant class” (Lamont & Molnár, 2002, p. 172), he was able to position himself as a committed regular who has “significant degree of commitment to [a] social world through good times and bad” (Unruh, 1980, p. 282). In doing so, he engaged in confirmative praxis informed by the prevailing institutional logic. Enacting formal (educational/technical) and cultural (norms and beliefs) valued by the organisation-as-field capital enhances an actors internal legitimacy (Drori & Honig, 2013; Suddaby et al., 2017). His positioning as a committed regular ‘who cares deeply about the firm’ emerged as a consequence from past achievements that are valued by the dominant coalition within the firm (Gardner et al., 2008). The position as a committed regular is therefore based on pro-active strategies to build and demonstrate moral legitimacy (Suchman, 1995) through appealing to the core value of the incumbent group (Greenwood et al., 2002). One can, in essence, speak of practical-evaluative agency (Emirbayer & Mische, 1998) directed towards the past to signal that ‘the old ways of doing things’ were historically appropriate to get the job done (Smets & Jarzabkowski, 2013).

8.3.2 Positioning as a dissident

Enacting an alternative logic that is not consistent with the field’s dominant logic positions the actor as a distinctly different “dissident” (Malsch & Gendron, 2013). Dissident are “not advocates of internal consensus but are willing to engage in internal conflict in order to adjust the group to external pressure” (Gouldner, 1958, p. 447). By demonstrating expertise and personal interests that are framed as distinctly different to the dominant group, the actor introduced moral assumptions and ideas from adjacent social worlds (W. W. Powell & Sandholtz, 2012; Suddaby & Viale, 2011). The introduction of an alternative logic opened up new avenues for achieving legitimacy (Patterson, Arthur, & Washington, 2016, p. 292) and enabled the actor to better situate himself within the organisation-as-field (Durand, Szostak, Jourdan, & Thornton, 2013; Reay & Hinings, 2009). The dissident position also enables the mobilisation of other actors (challengers) who are more receptive to the alternative logic because of their initial dispositions. A dissident position rests on segregating praxis through the enactment of formal and political capital not necessarily conceived as valuable by the dominant group within the organisation-as-field. Segregating praxis therefore refers to the demonstration of some novel skills or expertise (Lawrence, 2004), inter-organisational mobility (Battilana, 2006) and in general the exposure to a variety of contexts (Pache & Santos,

2013b). The dissident position is based on efforts to demonstrate existing relationships and support from external constituents (Gardner et al., 2008; Tracey et al., 2011).

The type of legitimacy can be described as discursive (Hardy & Phillips, 1998) in terms of the alleged right to speak on particular issues (Hardy & Phillips, 1998; Lawrence & Suddaby, 2006) or plausible claims of competency (Deephouse & Suchman, 2008). Through the use of technical resources and deliberate efforts to build an individual, commercial-orientated personal brand, segregating practices create awareness of alternative actors (Lawrence & Suddaby, 2006, p. 226). A dissident position entails a degree of projective agency where the actor presents himself as an alternative solution to future challenges (Emirbayer & Mische, 1998).

8.3.3 Positioning as a hybridiser

The main mechanism that enables actors to problematise the relevant skills and experiences of the incumbent group is based on calculated efforts to frame field level dynamics, and to craft a compelling story of a field-level crisis (George et al., 2006). This enables actors to undermine the legitimacy of incumbent actors and their respective capital (e.g., formal skills and relevant networks) in the light of field-level changes (Clemens & Cook, 1999; Malsch & Gendron, 2013). In this context, Pache and Santo (2013b) argue that “some actors, namely those that can embrace two logics at the same time, are in a particularly favorable position to lead organizations through adaptation and innovation” (p. 29). Literature on organisational change has already shown that change agents must “justify changes with respect to the organization's own claimed ideals, espoused identity, and distinctive history” (Kraatz & Block, 2008, p. 263).

A social position as a hybridiser refers to an actor's ability to bridge past and future to gain support for new ideas (Heusinkveld & Benders, 2005). Bridging practices thus refer not only to a demonstration of sensitivity to the dominant logic and actors (Fligstein, 1997; Maguire & Hardy, 2006; Smets et al., 2015) but also on an declaration of insiders' skills and knowledge as inappropriate in a changing context (see Greenwood et al., 2002). A hybridiser can be understood as a professional who can frame knowledge, identities, problems and solutions that align with the different logics at play (Blomgren & Waks, 2015; Kirkpatrick & Noordegraaf, 2015; Noordegraaf, 2015). Additionally, the hybridiser position rests on the

enactment of formal authority in the light of field level changes and perceived organisational shortcomings (Lawrence & Suddaby, 2006), This interplay between confirmative and segregating practices allows actors to reproduce their role as change agent, someone who has something distinct to offer while being sensitive to the organisation’s dominant logic.

8.3.4 Section Summary

This chapter shed more light on the pro-active and deliberate strategies actors draw upon to enhance their position and to gain legitimacy for their ventures (Lawrence, 1999; Suchman, 1995). Table 8.2 summarises the three different positions enacted by the institutional intrapreneur based on the dimensions discussed. It distinguishes between confirmative praxis that enacts capital that aligns with the dominant logic, segregating praxis that enacts capital aligned with the alternative logic, and bridging praxis that exploits the tension between those positions.

	Committed Regular	Hybridizer	Dissident
<i>Ends</i>	Positioning as committed to the firm	Problematizing dominant actors and framing alternatives	Positioning as distinctly different to the dominant coalition
<i>Position-takings</i>	<i>Confirmative praxis:</i> Enacting conformity with dominant logic	<i>Bridging praxis:</i> Blending of positions in light of field level changes	<i>Segregating praxis:</i> Enacting alternative logic
<i>Enacted forms of capital (tactics)</i>			
Formal	Demonstrating technical skills and specialist experience that align with the dominant logic	Presenting knowledge and skills as complementary;	Demonstrating knowledge and skills that align with the alternative logic
Cultural	Demonstrating past accomplishments that align with dominant logic and sophisticated understanding of the practices, values and history	Demonstrating that past success was actually based on alternative logic; undermining expertise of insiders	nA
Socio-Political	nA	Demonstrating socio-political capital as a change agent.	Demonstrating support from clients and external networks
<i>Locus of legitimacy</i>	Internal	External and internal	External
<i>Type of legitimacy</i>	Normative	Pragmatic/Normative	Discursive
<i>Form of agency</i>		Practical evaluative	Future Oriented
<i>Temporal orientation</i>	Past	Present	Future

Table 8.2: Social position in praxis

8.4. The praxis of actors

This section addresses the second research:

RQ2: How do professionals promote alternative logics within their organisations and how is a dominant organisational logics disrupted?

The section discusses the practical activities of actors in promoting the alternative logic within the organisation-as-field. Building on the empirical themes that are summarised in Table 5.2, four different types of praxis—socio-material, political, sense-giving and cognitive—and associated tactics are discussed in turn. The starting point for the discussion is a quote from Lawrence and Suddaby's (2006, p. 219) seminal work where they assert that their conceptualisation of institutional work highlights “the awareness, skill and reflexivity of individual and collective actors”. Building on this, the two main forms of praxis that actors draw upon were ‘cognitive praxis’, creating awareness of alternatives and educating others in the relevant skills; and ‘sense-giving praxis’ that problematises existing practices and creates reflexivity amongst actors. In addition, ‘socio-political praxis’ denotes the purposeful mobilisation of a wider set of actors (Seo & Creed, 2002). Finally, ‘socio-material praxis’ infuses elements of the alternative logic into organisational routines and the social practices actors draw upon in their daily work. Although the distinct types of praxis did not follow a strict sequence and often occurred simultaneously, a temporal aspect needs to be mentioned. Initially, actors mainly resorted to cognitive and sense-giving praxis that is fundamentally rhetorical in nature, but their efforts became more substantial over time.

8.4.1 Cognitive praxis

Building on literature that demonstrates how an awareness of alternative logics emerges from an (organisational) actor’s exposure to ideas external to a field (Greenwood & Suddaby, 2006), this study shows how this awareness is quite purposefully infused into an organisation. This refers to efforts to sensitize actors to field level dynamics, to theorise the alternative logic as a viable solution and to educate actors in the skills and knowledge necessary to support the emerging logic. Those three tactics—sensitizing, theorising and educating—are discussed in turn in the light of the literature.

Sensitizing. Exogenous shocks have typically been associated with shifting logics in organisational fields because they “enable actors to reflect upon the institutional logics

ordering their world and to consider previously unthinkable possibilities” (Smets, Morris, & Greenwood, 2012, p. 878). While the emergence of a hybrid logic might be facilitated by field-level pressures, a sufficient number of field participants need to be aware of their existence and perceive them as a threat (George et al., 2006; Maguire, 2008). This necessitates purposeful efforts by actors to sensitise others in order to create “a shared understanding of their field” (Smets & Reihlen, 2012, p. 300). Apart from generating general alertness to the macro level conditions, this also included attempts to redefine the boundaries of the field (Suddaby & Viale, 2011). Mature fields are typically associated with strong mutual awareness as to which actors are part of a field and which are not (Greenwood & Suddaby, 2006; Scott, 2001). Conversely, emphasising the emergence of new actors who draw upon a rival logics exposes intra-organisational actors to alternatives, and increases the potential for a reflective shift in the actors’ consciousness (Seo & Creed, 2002). Those efforts also entailed the labelling and visualisation of threats to create productive tension and a common terminology to articulate field-level changes (Jarzabkowski & Lê, 2016; Lawrence & Suddaby, 2006).

Theorising. The absence of alternatives and taken-for-granted approaches to problem solving are cornerstones of institutional stability (Clemens & Cook, 1999). Literature has shown that exposure to other organisational fields has increased the awareness of central (organisational) actors for alternative institutional arrangements (Greenwood & Suddaby, 2006; Seo & Creed, 2002). The sheer existence of different logics at the field-level, however, lacks the internal representation of conflicting demands that is necessary for intra-organisational non-conformity (Pache & Santos, 2010). Building on these insights, this study more explicitly demonstrates how actors set out to expose a wider set of organisational members to alternative logics. Apart from sensitising actors to field-level dynamics, cognitive praxis consequently entails the theorisation of alternatives (David et al., 2012; Greenwood et al., 2002). By “articulating the essence of the hybrid logic” (Tracey et al., 2011, p. 71) and the portrayal of related alternative institutional arrangements as “a solution to some problem in the field” (Zietsma & McKnight, 2009, p. 148; Tolbert & Zucker, 1996), actors were opened up to new ideas. This again included the labelling and translation of the alternative logic in a compelling form (Kitchener, 2002; Orsato et al., 2002). Existing neo-institutional literature has long argued that the use of familiar concepts can underemphasise the novelty of alternative solutions and fosters adoption (Hargadon & Douglas, 2001; Oakes et al., 1998). Labelling of

the alternative logic (“Leverage Everything”) introduced a common language (Lawrence & Suddaby, 2006), while translation (into engineering language) reformulated ideas so they resonate with the dominant logic (Lawrence & Suddaby, 2006; McPherson & Sauder, 2013; Sahlin-Andersson, 1996).

Educating. Scholarship has shown that hybridisation requires actors who possess the necessary technical and social skills to support an emerging hybrid logic (Daudigeos, 2013; Suddaby et al., 2016). Along the same line, Lawrence and Suddaby (2006, pp. 227–228) maintain that the creation of institutions involves “educating of actors in skills and knowledge necessary to support the new institution [...] and to engage in new practices or interact with new structures”. Educational work thus equips actors with “the capacity (i.e. the expert knowledge) to adapt to the emerging new social order” (Suddaby et al., 2016, p. 18). Formal education of intra-organisational actors through workshops to enhance the business skills or commercial acumen of professionals (Francis & Sommerlad, 2009; Greenwood & Suddaby, 2006; Kurunmäki, 2004); presenting case studies and evidence from comparable organisations (Lounsbury, 2001); or internal marketing to raise awareness of the alternative service offering; attempted to broaden the knowledge base often associated with institutional transformation (Kirkpatrick & Noordegraaf, 2015; Thornton et al., 2005). Educating work also refers to deliberate marketing campaigns to promote the alternative logic at the field level to appeal to a broader audience (see Perkmann & Spicer, 2008; Singh & Jayanti, 2013).

Essentially, cognitive praxis necessitates a purposeful enhancement of cognitive legitimacy since stakeholders need to have sufficient shared understanding of the hybrid logic (Aldrich & Fiol, 1994; Gardner et al., 2008). It rests on the “comprehensibility” (Suchman, 1995, p. 571), the “technical soundness” (Greenwood et al., 2002, p. 75), and the functional superiority of alternative ideas (Goodrick & Reay, 2010). This also included the emphasis of “economic advantages afforded by new practices” (Maguire & Hardy, 2009, p. 168) and “their adoption by exemplary others” (Greenwood et al., 2002, p. 75). However, given the “non-economically rational” (Suddaby, 2010, p. 18) nature of practices and behaviours central to institutional thought, cognitive legitimacy at best facilitates change (Voronov & Vince, 2012). Whether individual praxis results in the abandonment of existing practices rests on the ‘moral’ alignment with collectively shared assumptions that determine to what extent an activity is “the right thing to do” (Suchman, 1995, p. 579).

Nevertheless, by creating collective awareness of field level dynamics and theorising alternatives, the taken-for-grantedness of a dominant logic is undermined. The literature already suggested that the internal representation of alternative logics is a key explanatory factor for institutional change or maintenance (Pache & Santos, 2010). Cognitive praxis can therefore be framed as purposeful attempts to construct institutional complexity within the organisation-as-field (Seo & Creed, 2002; Smets & Jarzabkowski, 2013; Smets, Morris, & Greenwood, 2012). In this context, Pache and Santos (2013b, p. 13) contend, the “exposure to competing logics challenges the taken-for-granted character of compliance and forces individuals to exercise some degree of agency when complying with a given logic rather than with an alternative one.” Introducing the alternative logic to the organisation-as-field makes the dominant logic appear less inevitable (Voronov & Vince, 2012). Constructing “a shared story of the crisis” (Garud et al., 2007, p. 964) faced by the organisation, and theorising solutions, provided actors with the cultural tools (e.g., a common language, visual threats) to critically examine existing arrangements and mindful deviations (Garud & Karnøe, 2001; George et al., 2006, p. 200; Schneiberg & Lounsbury, 2008).

8.4.2 Sense-giving praxis

Whereas cognitive praxis generates awareness of alternatives, sense-giving praxis infuses reflexivity and aligns the alternative logic with collectively-held professional ideals (see Lawrence & Suddaby, 2006). Sense-giving praxis thus moves beyond the communication of field-level dynamics and alternative forms of organising towards “framing and articulating a particular vision of organizational and institutional reality” (Ocasio, Loewenstein, & Nigam, 2015, p. 35). When promoting alternative logics, actors “shape the sensemaking processes of organization members toward some intended definition of reality” (Maitlis & Lawrence, 2007, p. 58) and construct opportunities “in ways that appealed to the values of the receivers” (Bartunek, Krim, Necochea, & Humphries, 1999, p. 38). Depending on the underlying end, the tactics involved are labelled ‘problematizing’, ‘framing’, and ‘identity alignment’.

Problematizing. Thornton and colleagues suggest that (2012, p. 163) “critical events may be required for contradictions to become evident for field participants”. Thus, problematizing work entails the portrayal of existing practices as insufficient in the light of field level changes, and exposes actors to inherent contradictions. The experience of contradictions arising from

institutional complexity is a cornerstone of literature on institutional change (Benson, 1977; Greenwood et al., 2011). Contradiction can trigger a shift in actor's consciousness from "unreflective participation in institutional reproduction to imaginative critique of existing arrangements" (Seo & Creed, 2002, p. 230). Scholarship that builds on Seo and Creed's (2002) framework described inherent contradictions as preceding praxis within an institutional context (Greenwood & Suddaby, 2006; Pache & Santos, 2010). More recent literature locates the experience of contradictions in the fundamental nature of specific types of professional work (e.g., Smets, Morris, & Greenwood, 2012). The findings presented in this study suggest a middle ground as actors purposefully exposed actors to contradictions by revealing the problems in existing practices in the light of field-level changes.

The existence of contradictions does not merely trigger praxis, but individual praxis entailed the purposeful "exploitation of the tensions" (Whittington, 1992, p. 704) between and within logics (Durand et al., 2013; Suddaby & Greenwood, 2005; Thompson et al., 2016). Creating awareness of field level changes, and infusing institutional complexity into the organisation through cognitive praxis, enables actors to declare existing practices as inappropriate in the light of contextual changes (Hardy, Lawrence, & Phillips, 2006). This emphasises shortcomings and inconsistencies embedded in the dominant logic (Empson et al., 2013), and undermines assumptions regarding efficiency and effectiveness of existing practices (Lawrence & Suddaby, 2006; Maguire & Hardy, 2009). The skilful interpretation and exploitation of contradictions embedded in the dominant logic created discomfort, triggering the actor's reflexivity (Maclean, Harvey, & Chia, 2012; Suddaby & Greenwood, 2005). Through the use of metaphors, familiar examples, analogies and artefacts such as humorous cartoons, actors were equipped with the cultural tools to problematise existing arrangements (Cornelissen & Clark, 2010; McPherson & Sauder, 2013; Thompson et al., 2016). The introduction of the alternative logic also enabled actors to examine and discuss existing practices through a broader set of angles such as business rationality (Lawrence & Suddaby, 2006; Malsch & Gendron, 2013; Townley, 2002). More importantly, actors demonstrated how existing practices fail to meet elements central to the dominant logic such as winning projects and solving a client's problems (Maguire & Hardy, 2009; Thornton et al., 2012).

Framing. As an extension of just problematising work that refers to practices associated with the dominant logic, framing work entails the portrayal of field-level issues and

alternative practices in the light of “mutually desirable outcomes” (Reay & Hinings, 2009, p. 646; see Benford & Snow, 2000; Hargrave & Van De Ven, 2006). Alternative solutions were articulated as “indispensable, valid, and appropriate” (Garud et al., 2007, p. 962) in the light of the dominant logic. Framing consequently necessitates actors (hybridizers) who skilfully draw on a reflective understanding of their socio-cultural context and the interests and identities of other actors (Benford & Snow, 2000; Hardy & Maguire, 2008; Maitlis & Lawrence, 2007). By emphasising the alignment of field-level changes with dominant practices and identities and framing alternatives based on existing beliefs, actors introduced the alternative logic as a more appropriate way to achieve the ends valued by the dominant coalition (Battilana et al., 2009; Thompson et al., 2016). A more diversified service offering was consequently not only justified and promoted based on economic considerations. More importantly, it was framed as in the best interest of both clients and society, in terms of solving increasingly complex problems that the incumbent actors had failed to do (Garud et al., 2007; Kitchener, 2002; Suddaby et al., 2007; Suddaby & Greenwood, 2005). The strategic use of framing through the assignment of blame, the definition of problems and the articulation of solutions in a way that addresses the grievances and interests of stakeholders, in turn facilitated the collective action necessary for change (Benford & Snow, 2000; Fligstein, 2001; Garud et al., 2007). Framing laid the groundwork for collective mobilisation of actors, by articulating a common ground that “resonates with the interests, values, and problems of potential allies” (Battilana et al., 2009, p. 80).

Identity alignment. Finally, ‘forging’, ‘shaping’ or ‘constructing’ a common organisational and occupational identity takes a central role in the literature on micro level institutional transformation (Fligstein, 1997; Greenwood et al., 2011; Lawrence & Suddaby, 2006; Lounsbury, 2001; Seo & Creed, 2002). By targeting the belief systems of others, actors can shape the direction of change, and encourage others to enact an alternative logic (Schildt & Perkmann, 2016). Muzio and Faulconbridge (2013, p. 24) emphasise the importance of “identity work techniques in producing individuals who are able to internalize and enact competing logics” to facilitate organisational hybridisation. In the case presented here, actors articulated a common identity around the firm’s, and the individual’s, ability to act as business-oriented solvers for increasingly complex problems (Oakes et al., 1998; Perkmann & Spicer, 2008). Sense-giving praxis entails “crafting an attractive social identity that appeals to

potential field members" (Battilana et al., 2009, p. 85). As with framing work, the constructed identity was aligned with the ideals of the broader socio-cultural context, incorporating elements of both logics (Battilana & Dorado, 2010; Battilana et al., 2009). Because the engineering identity is embodied in the artefact produced, the hands-on implementation and producing real-world outcomes, together form a key part of the alternative occupational identity. A common theme in the literature is that hybrid organisations construct an identity that is based on their distinctiveness from non-hybrid organisation (e.g., Battilana & Dorado, 2010; Battilana & Lee, 2014; Mair et al., 2015). Identity alignment also involves the claims of differences from other field-level actors (Lounsbury & Glynn, 2001; Patterson et al., 2016). In the case presented here, this refers to the distinctiveness from the Big Four accounting firms. By stressing external pressures and redefining the field's boundaries, actors were able to portray a new logic as "merely an appropriate response to an ever-changing society" (Goodrick & Reay, 2010, p. 76) based on the engineering profession's distinctiveness to other occupational groups (Greenwood et al., 2011).

In contrast to cognitive praxis, sense-giving praxis denotes efforts to establish moral legitimacy for the alternative logic. Through "invocations of collectively valued ends" (Deephouse & Suchman, 2008, p. 67), and articulation of goals, means and identities that appealed to the professions core values, actors displayed the alternative logic as "desirable, proper or appropriate" (Suchman, 1995, p. 574; Suddaby & Greenwood, 2005) in the light of field-level dynamics. In line with broader literature that draws on concepts such as identity management (e.g., Covalleski et al., 1998), sense-giving (e.g., Cornelissen, 2011; Ocasio et al., 2015), framing work (e.g., Benford & Snow, 2000), and in fact most literature on institutional transformation in professional fields (e.g., Greenwood & Suddaby, 2006; Greenwood et al., 2002; Suddaby & Greenwood, 2005), the tactics presented so far predominantly refer to the social actor's use of "persuasive speech or rhetoric" (Suddaby & Viale, 2011, p. 434) to theorise and legitimise change. In contrast, socio-political and socio-material praxis denote effort that had more substantial elements and consequences.

8.4.3 Socio-political praxis

Seo and Creed (2002, p. 230) point out that praxis involves "mobilization and collective action" where a sufficient number of actors deviate from established practices (Barley & Tolbert,

1997). Any dissemination of alternative logics requires a “transition from theoretical formulation to social movement to institutional imperative” (Strang & Meyer, 1993, p. 495). Actors therefore not only need to create a vision for change, through cognitive and sense-giving praxis, but also to mobilise others behind this vision (Battilana et al., 2009; Smets, Morris, & Greenwood, 2012). In line with existing literature, this happened through internal and external ‘recruitment’ of supporters and the ‘clustering’ of actors to create more unified support.

Recruitment. Institutional stability and reproduction are often associated with promotional and recruitment practices when selection processes reward conformity with a field’s dominant logic (A. Cook et al., 2012; Lawrence & Suddaby, 2006; Zilber, 2002). However, the hiring of practitioners who draw upon different logics can, either purposefully or accidentally, spark organisational and institutional change, as it furthers the internal representation of competing logics (Pache & Santos, 2010). External actors who are “socialized into, and carriers of different logics from the start” (Blomgren & Waks, 2015, p. 98) introduce alternative practices into an organisation-as-field, expose actors to contradictions, and facilitate organisational hybridisation (Battilana & Dorado, 2010; Greenwood & Suddaby, 2006; Pache & Santos, 2010). In highly institutional contexts, the hiring of external actors is inherently problematic since they often lack the legitimacy associated with a dominant logic’s institutional prescriptions (Empson et al., 2013). While attempts to recruit Big Four or non-engineering personal were observed, the attitude towards outsiders who are not familiar with “the Corgan way” made these contested. Thus, socio-political praxis predominantly entailed the internal recruitment of professionals (challengers) who possess the formal (engineering education) and cultural capital valued by the organisation-as-field. Nevertheless, their slightly different personal interests and their broader educational and professional background made them more inclined towards the alternative logic. Smets and colleagues (2012, p. 896) refer to such actors as “professionals predisposed to a given logic” who are more open “to unfamiliar ways of working”. Recruitment work here entails the purposeful exploitation of intra-professional “cohort differences” (Leicht & Fennell, 1997, p. 227). By distinguishing between professionals who are “more or less amenable to specific dimensions of a proposed change” (Detert & Pollock, 2008, p. 188), actors identified individuals who were more likely to draw upon an alternative logic (Seo & Creed, 2002). Recruitment work also entailed the purposeful

construction and demonstration of support from external, field-level actors through networking activities (Daudigeos, 2013; Drori & Honig, 2013).

Clustering. Apart from recruiting internal and external supporters, socio-political praxis entails the clustering of those professionals in close organisational proximity through the establishment of the new Advisory Services practice area. Clustering of “like-minded professionals” (Smets, Morris, & Greenwood, 2012, p. 896) enables institutional distancing and shields actors from the dominant logic’s normative influences. The newly created organisational sub-unit constituted a ‘relational space’ (Kellogg, 2009) for professionals where the initial predisposition of challengers was reinforced through shared work experiences, continuous interactions and purposeful socialisation through mentoring (Covaleski et al., 1998; Jennings & Greenwood, 2003; Smets, Morris, & Greenwood, 2012). Actors sparked a social movement within the organisation through “direct and deliberate techniques of social suasion” (Lawrence & Suddaby, 2006, p. 221). While cognitive and sense-giving praxis entails “loosening’ the institutional embeddedness of those being mobilized” (Battilana et al., 2009, p. 78), socio-political praxis created more multilateral and collective support based on a new, collective understanding of social actors (Seo & Creed, 2002). The findings suggest a middle ground between the heroic notion of institutional entrepreneurs who act in relative isolation and accounts that describe institutional transformation as mostly distributed and more unintentional or serendipitous (see Battilana et al., 2009; Lounsbury & Crumley, 2007; Smets, Morris, & Greenwood, 2012). In the case presented here, change was sparked by a smaller number of actors who acted purposefully and intentionally. But diffusion required collective agency by actors who were “supportive or facilitative of the entrepreneurs’ endeavours” (Lawrence & Suddaby, 2006, p. 217; Leblebici et al., 1991). Over time, those actors interpreted the guiding “institutional vision” (Smets & Jarzabkowski, 2013, p. 1300) in their own way while doing their work.

Socio-political praxis enhances the socio-political legitimacy of alternative ideas through the establishment and demonstration of support from “internal and external constituents” (Gardner et al., 2008, p. 1105). These findings are of course unsurprising, irrespective of the institutional dynamics involved. The literature has already shown that innovation in professional services is characterised by intra-organisation politics to build organisational support for new ventures (Anand et al., 2007; Heusinkveld, Benders, & van

den Berg, 2012; Mintzberg, 1979). However, through socio-political praxis, actors elevated “their position from atomistic marginal players to a unified and central actor” (Lawrence & Suddaby, 2006, p. 229). The mobilisation of challenger actors and recruitment of external professionals made the alternative logic more substantive within Corgan. Whereas cognitive-praxis and sense-giving praxis were not really contested, opposition emerged once challengers threatened “established organizational privileges and social positions” within the organisation-as-field (Battilana et al., 2009, p. 78). Despite most incumbent actors rhetorically endorsing the alternative logics, they withheld socio-political support once the enactment of new practices became more consequential for their daily work (Kellogg, 2009; Lefsrud & Meyer, 2012).

8.4.4 Socio-material praxis

Although creating awareness of alternative logics, normative justification of those, and the mobilisation of allies does facilitate change, the diffusion of alternative ideas rests on their material manifestation and enactment (Greenwood et al., 2002; McNay, 1999). Building on this thought, socio-material praxis seeks to infuse “the normative foundations of an institution into the participants' day to day routines and organizational practices” (Lawrence & Suddaby, 2006, p. 233). Once new practices are entrenched in structures, processes and social practices, their enactment becomes increasingly rewarded and taken-for-granted (Perkmann & Spicer, 2008). While ‘routinisation’ work denotes the instantiation and codification of alternative logics into organisational rules and procedures (Hwang & Colyvas, 2011), ‘integrative embedding’ refers to the permanent relocation of actors. As noted above, actors studied for this thesis resorted mainly to the three forms of praxis outlined above. Only recently did those efforts become more substantial and consequential.

Routinisation. Institutional change necessitates that inter-subjective awareness and mutual understanding of appropriateness becomes “codified into formal measures of performance and accomplishment” (W. W. Powell & Colyvas, 2008a, p. 292). At the organisational level, socio-material praxis consequently denotes “a set of purposeful actions aimed at changing organizational processes” (Daudigeos, 2013, p. 724). Actors attempted to undermine “the mechanisms that lead members to comply with institutions” (Lawrence & Suddaby, 2006, p. 235) such as IT systems and performance-measures, by questioning their

relevance and significance. Recent literature on micro level institutional dynamics has already highlighted the important role of technological systems in institutional transformation or institutional stability (Hultin & Mähring, 2014; Lawrence et al., 2013; Raviola & Norbäck, 2013). In the case presented here, socio-material artefacts such as the firm's IT system, contribute to the persistence of the dominant logic through reports that focus on productivity. Similarly, incentive systems generally reward conformity although actors increasingly rejected their relevance (Empson et al., 2013; Lawrence & Suddaby, 2006; Townley, 1997). The same can be said for other socio-material elements such as weekly emails and award ceremonies that predominantly celebrated success aligned with the dominant logic (Angus, 1993; Lawrence & Suddaby, 2006). As the empirical data demonstrates, however, current attempts are indeed being made to fundamentally change the firm's performance measurement system in line with the alternative logic.

Integrative embedding. Finally, socio-material praxis refers also to the diffusion of the alternative logic to the broader organisation. In contrast to socio-political praxis where actors are assembled in close physical proximity and socialised towards the alternative logic, integration of alternative logics necessitates the embedding of those in the broader organisation-as-field (Suddaby & Viale, 2011). In this context, the literature has identified the creation of "new roles needed to carry on institutional routines" (Lawrence & Suddaby, 2006, p. 230) as facilitating institutional transformation (Empson et al., 2013). The establishment of new positions such as 'Advisory advocates' or 'Shadow CRMs' can be framed along the same lines. As this study shows, the relative short-term nature of these initiatives resulted in little consequence. More profound change was achieved only through the integrative embedding of actors through prolonged physical proximity and collaboration. Institutional scholarship has already shown that "collaboration provides the foundation for processes essential to institutionalization" (Phillips, Lawrence, & Hardy, 2000, p. 39). The purposeful design of individual roles, organisational structures or work practices around collaboration facilitates the "interaction among diverse organizational members who act as carriers of diverse logics" (Zilber, 2017, p. 73), and can serve as a trigger for change in the institutional logics guiding the organisation-as-field (Battilana, Sengul, Pache, & Model, 2015; Thornton et al., 2005). Socio-material praxis entails the organisation of practices in the view of strategic ends through

formal and informal integrative mechanisms (Dougherty, 2004; Jarzabkowski, Lê, & Feldman, 2011; Okhuysen & Bechky, 2009).

Socio-material praxis essentially enhances the pragmatic legitimacy of alternative logics. Through the continued and routinised enactment of alternative logics and the consistent emphasis of positive outcomes, the functional superiority of alternative practices is demonstrated (Suddaby et al., 2017, 2009). Formal processes and informal practices that reward the enactment of an alternative logic facilitate diffusion. Once new ideas are gradually objectified through their application to localised demands of solving problems and formalised in organisational routines, the demonstration of practical outcomes can foster adoption by a wider set of actors (Hargadon & Douglas, 2001; Rao, 1994; Smets & Jarzabkowski, 2013; Smets, Morris, & Greenwood, 2012).

8.5. The consequences of praxis

This thesis distinguishes between three consequences emerging from the four types of praxis that were discussed in section 8.4. First, cognitive and sense-giving praxis resulted in an ‘assimilation’ of logics where symbolical and rhetorical elements of the hybrid logic were adopted by a wider range of professionals, but socio-material practices remained unchanged. Second, an ‘amplified separation’ between the two logics emerged when proponents of the alternative logic were organisationally separated (compartmentalised) through social-political praxis and sense-giving work sparked a sense of distinctiveness. Finally, the ‘integration of logics’ requires spatial proximity and shared work experiences.

8.5.1 *Assimilation*

Cognitive-praxis created awareness amongst actors of field-level dynamics and alternative logics of doing professional work. Sense-giving praxis then established the alternative logic’s “normative appropriateness over and above pragmatic value” (David et al., 2012, p. 368). Most importantly, the establishment of an organisational sub-unit (Advisory Services) that draws upon a competing logic can be framed as emergent institutional change (Heinze & Weber, 2016). The findings can thus be portrayed as an emergent hybrid logic within the organisation where actors increasingly draw upon alternative ideas. In general, however, identities, processes, structures and practices at Corgan represented the dominant logic. Institutional scholarship speaks of “decoupling” (Oliver, 1991) when alternative logics are symbolically,

rhetorically and even structurally enacted, but fundamental practices and meanings persist (J. W. Meyer & Rowan, 1977; Pache & Santos, 2013b; Tolbert & Zucker, 1996). Drawing on this long-standing idea, Pache and Santos (2010) refer to “decoupled practices” when actors symbolically endorse an alternative logic but do not actually implement it. Similarly, Thornton and colleagues (2012) use the term “assimilation” whenever “the core elements of the original logic prevail” (p. 165) and an alternative is enacted in peripheral activities (Besharov & Smith, 2014; Scott, 2005a; Thornton et al., 2012)..

Building on this line of thought, Skelcher and Smith (2015, p. 442) introduce the notion of “assimilated hybrid” for organisations that reflect “the expectations of the new logic in terms of its structure, symbols, and language, but in its day-to-day practice continues to operate in line with its institutional origins “. Instead of portraying the dynamics involved as the full-fledged emergence of a blended hybrid, the findings presented describe an assimilated hybrid. As elaborated above, organisational processes such as the firm’s performance-measurement system or recruitment practices predominantly reward conformity with the dominant logic (Empson et al., 2013; Flood, 2011; Lawrence & Suddaby, 2006; Zilber, 2002). The same can be said for more informal practices that continue to valorise and celebrate the enactment of the dominant logic (Angus, 1993). Schildt and Perkmann (2016, p. 3) speak of “scheme conserving change” whenever “priorities based on the institutional logic(s) that already prevailed in the organization” are retained and the organisation responds to “a newly salient logic with minimal changes to existing strategy and identity”. This is reflected in the predominant focus on winning more engineering work and delivering it more cheaply while the alternative service offering is somewhat neglected; also despite all the rhetorical support for the alternative logic, individual identities are very much aligned with the dominant logic.

A blended identity that incorporates “synergistic elements [of multiple logic] into a new singular identity” (Skelcher & Smith, 2015, p. 442) did not emerge. One could instead speak of decoupled identities where “individuals gave the appearance of accepting the new logic but continued to act in accordance with the old logic” (Reay & Hinings, 2009, p. 632; Townley, 2002). Similarly, Witman et al. (2011) observe that doctors in management positions sometimes display managerial language and behaviour, but their medical habitus “remains their second nature” (p. 477). Although the literature portrays participation in educational

programs as a key element of institutional transformation (Daudigeos, 2013; Lawrence & Suddaby, 2006), workshops or training sessions organised by actors did not result in the practical application of new knowledge. The new knowledge did simply not fit with the cognitive maps of actors guiding their practice (Crossan, Lane, & White, 1999). Those findings also caution against insights from the literature (e.g., Francis & Sommerlad, 2009; Kirkpatrick & Noordegraaf, 2015; Kurunmäki, 2004) showing how institutional logics were hybridised by simply educating actors in the relevant skills.

Finally, these findings also question to what extent sense-giving work enhanced the reflexivity of embedded actors. Most actors acknowledged external challenges and internal problems but continued to enact the dominant logic. Drawing on the four distinct types of reflexivity suggested by Suddaby and colleagues (2016), most actors at best developed some sort of “incumbent reflexivity” where they “recognise the key challenges” but only had the ability to “strategize within the social constraints of the existing field” (p. 16). The group of actors who were introduced as challengers in section 8.2 established a more critical stance, however, and developed an increased dissatisfaction with the dominant logic that governed the organisation.

8.5.2 Amplified separation of logics

While the rhetorical nature of cognitive and sense-giving praxis resulted in the assimilation of the alternative logic, socio-political praxis amplified the separation of logics within the organisation. In essence, socio-political praxis compartmentalised the logics through the organisational distancing of actors (Smets, Morris, & Greenwood, 2012). What emerged can be regarded as a structural hybrid where logics are physically separated in an organisational unit and enacted by a distinct group of actors (Greenwood et al., 2011; Kraatz & Block, 2008; Smets et al., 2015). The purposeful identification of professionals (challengers) and their structural separation in a “relational space” (Kellogg, 2009) through socio-political praxis reinforced their common orientation towards the alternative logic (Smets, Morris, & Greenwood, 2012). One could speak of the confined enactment of an alternative logic where a group of actors draw upon it in relative isolation to other field participants. Separation facilitates hybridisation because it shields actors who draw upon an alternative logic from the dominant logic guiding the organisation-as-field; however it also isolates actors from those

enacting the dominant logic (Kellogg, 2009; Smets, Morris, & Greenwood, 2012). In other words, although compartmentalisation balances competing institutional demands, it creates barriers for collaboration and generates conflicts.

This effect is emphasised by Greenwood et al. (2011, p. 335) who state that “structural compartmentalisation—especially in institutional terms—militates against cooperation.” Of course, in some instances, the separation of presumably incompatible logics might be desirable because it mitigates the risk of slippage towards one alternative (Battilana & Dorado, 2010; Covalleski et al., 2003; Smets et al., 2015). For instance, McDougald and Greenwood (2012, p. 104) discuss the re-entry of the Big Four firms into management consulting work and applaud them for “much clearer policies about the separation of consulting and assurance work”. Yet many alleged benefits of hybrid organisations are underpinned by a notion of blended hybridity that emphasises the artful integration or combination of logics and actors (Battilana, Lee, Walker, & Dorsey, 2012; Greenwood et al., 2011). For instance, Jay (2013, p. 137) argues that “hybrid organizations combine institutional logics in their efforts to generate innovative solutions to complex problems.” In the case presented here, socio-political praxis in terms of identifying actors who were more tethered towards the alternative ideas and their organisational distancing amplified the separation between logics and actors drawing upon them. Of course, this is not surprising as a vast area of literature shows how distinct identities (Ferlie, Fitzgerald, Wood, & Hawkins, 2005; Santos & Eisenhardt, 2005); occupational backgrounds (Bechky, 2011; Edmondson & Nembhard, 2009); departmental thought worlds (Dougherty, 1992); knowledge characteristics (Carlile, 2002); spatial distance (Sturdy, Clark, Fincham, & Handley, 2009); or more broadly, the enactment of incompatible institutional logics (Greenwood et al., 2011; Reay & Hinings, 2009), can hamper collaboration, knowledge sharing and innovation.

Nevertheless, the findings are noteworthy in light of the research interest in unintended consequences of micro level praxis. While the institutional intrapreneur’s “institutional vision” (Smets & Jarzabkowski, 2013, p. 1300) at the outset represented some form of blended or integrated hybrid, efforts to promote their ideas resulted in something different. The identification of professionals who were, by their very nature, more inclined towards the alternative logic and their organisational clustering, triggered and increased their sense of distinctiveness. Prolonged social interaction of those professionals, and purposeful

efforts of socialisation towards the alternative logic, further accentuated the differences from other actors. Increasingly embodying the institutional intrapreneur's portrayal as a dissident into their own identities, those actors developed an acute and collective sense of otherness and dissatisfaction. They adopted a shared identity based on distinctiveness within the organisation-as-field ("Advisory Services vs. the rest of Corgan"), a shared language ("Corgan blockers"), or taken-for-granted explanations for the problems they face ("the engineers don't get it").

Institutionalists would speak of a "proto-institution" (Lawrence et al., 2002) that emerged within the organisation. The rise of those were fuelled by cognitive and sense-giving praxis that provided challenger actors with the cultural tools to problematise the existing arrangements and to articulate alternatives. Some existing scholarship has already noted "that individual actors embedded in the same organization may respond differently to opportunities for institutional work" (Empson et al., 2013, p. 834; Battilana & D'Aunno, 2009). This study emphasises the importance of intra-professional "cohort differences" (Leicht & Fennell, 1997, p. 227) that emerge from more micro level attributes such as educational or professional trajectories and individual interests. In this context, Seo and Creed (2002, p. 230) note that praxis inspires the actors with a "new collective understanding of their social conditions and themselves". And yet, some of the intra-organisational actors in this study were more inspired than others by the praxis to promote the alternative logic within Corgan. In this context, Suddaby et al. (2016, p. 7) introduce the notion of "challenger reflexivity" that is "characterized by a form of reflexivity [...] quite distinct from that of the incumbent elites". They argue that one of the key features of this form is the ability and capacity to go "beyond the scope of technicalities to define problems and issues, translating ultimately into some form of engagement toward action" (p. 17). A set of actors in this study were similarly more open to alternative ideas and more prone to develop dissatisfaction with the dominant institutional arrangements and to follow the intrapreneur's institutional leadership (Kraatz & Moore, 2002; Selznick, 1957; Washington, Boal, & Davis, 2008).

8.5.3 Integration of logics

Under various labels such as "communities of practice" (Duguid, 2005, p. 113), "relational space" (Kellogg, 2009), "trading zones" (Heinze & Weber, 2016, p. 163) or "spaces of

negotiation" (Battilana et al., 2015, p. 1658), recent practice-based institutional research demonstrates that micro level institutional transformation or stability emerges from the prolonged interaction of actors in their social setting. The integration of alternative logics rests on formal or informal mechanisms that "enable interaction among diverse organizational members who act as carriers of diverse logics" (Zilber, 2017, p. 73). Some literature has shown that such situations emerged through mergers and acquisition where "actors from divergent cultures are forced into association" (Thornton et al., 2005, p. 129). Others draw on a much less dramatic notion in terms of shared problems that need to be addressed through interaction and integration of actors (Smets, Morris, & Greenwood, 2012). This study suggests a middle ground as actors purposefully relocated to establish collaboration, but the relocation was neither mandated by the organisation nor imposed by the nature of their work.

Nevertheless, this study confirms more recent literature on micro level change that shows how hybrid practices at the intra-organisational are not imposed on actors by external constitutions but emerge based on a "common purpose and connectedness through participation in practice" (Smets, Morris, & Greenwood, 2012, p. 899). The integration of alternative logics depends on the "way particular bodies, objects, practices, and talk are co-located" (Hardy & Thomas, 2015, p. 686). Through constant and routinised enactment of new practices they might "trickle up" (Quack, 2007, p. 643) and diffuse to a wider range of actors within the organisation-as-field and eventually to the broader organisational field. However, this requires a significant period of collaboration in which to build trust and to demonstrate the pragmatic benefits of new practices (Smets, Morris, & Greenwood, 2012). This also raises the inherent tension between socio-political and socio-material praxis. Mobilisation of actors requires some sort of isolation of actors that shelters them from the dominant group of actors. Conversely the diffusion of alternatives necessitates the close interaction and collaboration of actors who enact competing institutional logics.

8.6. Chapter summary

This chapter addressed the research questions from a theoretical perspective. First, it differentiated between two groups of actors, the challengers and the incumbents, to facilitate the discussion. It discussed how the institutional intrapreneurs purposefully constructed a social position by enacting different types of capital that were associated with the two logics

at play. The next section focused on the actual praxis of actors in introducing and promoting the alternative logic within the organisation-as-field and identified four types of praxis and associated tactics. Finally, the chapter discussed how deliberate efforts to promote an alternative logic resulted in outcomes that did not result in the integration of logics in daily work practices. While some actors drew upon the alternative logic in substantial ways, others remained committed to the dominant and evoked the alternative logic only in a superficial fashion. This led, in turn, to an amplified separation between actors inspired by praxis.

Table 8.2 summarises the key elements that were discussed. As can be seen, the distinction between different sets of tactics in Table 8.2. is based on the entity at which the institutional agency is directed. Cognitive praxis can refer either to the theorisation of organisational structures and processes, or to the nurturing of individual knowledge and skills. Sense-giving praxis problematises existing organisational practices or aligns individual identities. In combinations, these strategies resulted in the assimilation of the alternative logic when actors predominantly drew upon it in a rhetorical way. Socio-political praxis might be directed towards organisational structures through the creation of a new sub-unit, or towards the recruitment and socialisation of individuals. Within Corgan, however, emerged an amplified separation between actors who draw upon the two logics. This outcome was inspired by cognitive and sense-giving praxis and reinforced through socio-political praxis of clustering. Finally, socio-material praxis refers to the infusion of alternative logics into organisational routines and the facilitation of constant interaction of actors who draw upon both logics.

	Cognitive	Sense-giving	Socio-political	Socio-material
Ends	Fostering awareness and relevant skills	Infusing reflexivity and normative alignment	Mobilization of actors to create collective support	Diffusion and entrenchment
Means (Tactics)				
<i>Organisational structures and processes</i>	<i>Theorize</i> : the essence of the hybrid logic	<i>Problematising</i> existing practices by exploiting contradictions	<i>Clustering</i> actors in organisational proximity	<i>Routinisation</i> of alternative logic in organisational routines
<i>Actors identity, skills and knowledge</i>	<i>Educating</i> actors in the relevant skills <i>Sensitizing</i> actors to field-level dynamics	<i>Identity alignment</i> : through the evocation of collectively valued ends <i>Framing</i> the alignment of field-level changes and alternative logic in	<i>Recruitment</i> of internal and external support and socialisation of actors	<i>Integrative embedding</i> of actors through co-location
Main form of legitimacy	Cognitive through shared understanding of alternatives	Moral through appealing to the values embedded in the dominant logic	Socio-political through external and internal support	Pragmatic through application in work practices
Consequences	<i>Assimilation</i> : Rhetorical support for alternatives but not enacted by a wider range of actors		<i>Amplified separation</i> : Cognitive and sense-giving praxis fosters sense of difference that is reinforced through clustering	<i>Integration</i> through prolonged collaboration and organisational routines

Table 8.3: Summary of observed praxis and consequences

CHAPTER 9: Conclusion

9.1. Aim of the chapter

The purpose of this chapter is to summarise the contributions this research has made to theory and practice, to discuss shortcomings, and suggest opportunities for future research. The first section elaborates on how this thesis enhances not only the current understanding of organisational hybridisation but also the practical insights gained in the context of professional service diversification. Based on these, the subsequent sections discuss the inherent limitations that emerged from the nature of the study and suggest avenues for subsequent research. This chapter ends with some concluding remarks and a personal reflection.

9.2. Contributions to theory and practice

This study originated from a general interest in PSFs that diversify into 'non-traditional' areas of work. In the course of the fieldwork, it emerged that the case organisation's attempt to do so was intertwined with efforts to introduce and promote an alternative institutional logic within the organisation. Existing literature has shown that diversification of PSFs and the related adoption of multi-disciplinary organisational forms has challenged fundamental elements of the professional logic, and introduced a commercial-market logic to some organisational fields. However, insights into the intra-organisational dynamics and the practical work involved were largely missing. These identified shortcomings built the basis for the research questions that this thesis sought to answer: (RQ₁) how individuals build a position within their firm to promote alternative logics and to challenge a dominant one; (RQ₂) the social actions involved when they do so; and (RQ₃) the consequences of those practical efforts. Those questions were addressed with a case study of an engineering consulting firm that was (and still is) trying to diversify into non-traditional engineering services and to adopt a more commercial business model. In addressing these questions, this thesis has made two major contributions concerning the micro level foundations of embedded institutional change. The third contribution has more practical relevance; it highlights the inherent challenging nature of professional service diversification and scrutinises the portrayal of contemporary professionals and PSFs as hybrid actors.

9.2.1 Contribution 1: Social position as agency

This study contributes to the emerging stream of work that seeks to open up organisations to examine how institutional complexity is represented and enacted by organisational actors (Bertels & Lawrence, 2016; Empson et al., 2013; Heinze & Weber, 2016; McPherson & Sauder, 2013). This allowed me to portray institutions as inhabited (Hallett, 2010; Hallett & Ventresca, 2006) and to account for how competing logics can be aligned, contested and promoted by different actors with different roles, identities, and institutional biographies. The literature reveals an actor's social position in the organisational field as a stable, antecedent condition that enables transformative action. Most research that evokes the notion of social position focuses on the organisation as the unit of analysis (Battilana & D'Aunno, 2009). Along the same lines, Drori and Honig (2013, p. 347) argue that few studies have "explicitly tackled the formation of internal legitimacy as an agglomeration of individual-level strategies" that enables actors to promote institutional change. This research instead explores the micro level of analysis by emphasising the skills and capital deployed by individual actors, thus offering a more dynamic notion of social position resting on purposeful position-taking by the institutional intrapreneur, through the enactment of multiple institutional logics.

I have shown that the institutional intrapreneur introduced the alternative logic to the organisation-as-field and created awareness of field level dynamics to enhance his position within the firm. The actor was able to exploit contradictory logics to legitimise himself as a change agent, by demonstrating conformity through the enactment of the dominant logic, and signalling non-conformity by drawing upon the alternative logic. The actor was also able to bridge the two logics by exploiting their complementarity in the light of field-level changes. In contrast to most existing literature that distinguishes between outsiders who promote change and insiders who defend the dominant logic, the institutional intrapreneur acted as both an insider and an outsider (Empson et al., 2013; Markowitz, Cobb, & Hedley, 2012; Rao & Giorgi, 2006). Although Pache and Santos (2013b, p. 28) already suggested that individuals that "can embrace two logics at the same time, are in a particularly favorable position to lead organizations through adaptation and innovation", this thesis explored the practical work involved in so doing in more detail. The findings emphasise the importance of the "situational sensitivity" (Smets et al., 2015, p. 960) of actors that necessitates the understanding of expectations and requirements of multiple logics.

9.2.2 Contribution 2: Exploring the early stages of potential institutional change

Suddaby and Greenwood (2009, p. 180) assert that there is “reasonably strong evidence that profound institutional change, such as the adoption of a new organizational form, is usually preceded by changes in institutional logics”. Consistent with recent practice-based institutional scholarship, this thesis locates the origins of broader institutional transformation in processes within organisations when actors face unfamiliar institutional logics (Schildt & Perkmann, 2016; Smets et al., 2015; Smets, Morris, & Greenwood, 2012; Zilber, 2002). Although existing contributions have shown how alternative logics in professional settings were promoted on the field level (Greenwood & Suddaby, 2006; Suddaby & Greenwood, 2005), the intra-organisational dynamics and the role of individuals in those attempts have received much less attention. In response, an ethnographic approach that relied primarily on participant observation enabled me to open up organisations and to attend to the “coalface” (Barley, 2008) of institutionalisation.

This research offers a fine-grained account of embedded actors who introduced an alternative logic into the organisation-as-field and created intra-organisational institutional complexity. In combination with sensitising others to field-level dynamics, this enabled them to exploit inconsistencies and contradiction embedded in institutional logics. This research thus more explicitly recognises the nested, multi-level character of institutional logics that both constrains actors, but also creates opportunities for embedded agency and social movements within organisations (Schneiberg & Lounsbury, 2008). Building on Seo and Creed’s (2002) framework, I demonstrated that contradictory logics are interpreted and utilised strategically by actors to promote alternative ideas and to enhance the reflective consciousness of others. Reflexivity features prominently in Lawrence and Suddaby’s (2006) seminal conceptualisation of institutional work. Yet, only a limited number of papers that build on these ideas have explored how individual actors gain insights into the constraints imposed on them by their institutional environments (Chia, 1996; Suddaby et al., 2016; Weick, 1995). Scholars are therefore calling to explore how reflexivity is developed as part of institutional agency (Lawrence et al., 2013). In line with the proposition by Greenwood et al. (2011, p. 341) that “‘seeing’ the contradiction between institutional prescriptions” may liberate actors, this study offers empirical insights into the manifold ways such seeing is achieved in-situ and in-vivo (Lawrence et al., 2013).

These arguments link to an additional contribution in the context of micro level institutional scholarship. While the four types of praxis and associated tactics have been already identified under various labels by broader research, this study offers a more interconnected, multi-level account of their intra-organisational aspects. More importantly, the empirical data also demonstrates how praxis manifests in an everyday organisational setting. It addresses Seo and Creed's (2002, p. 243) suggestion that what praxis "looks like empirically in an institutional contest warrants research". The methodological approach also addresses a rather paradoxical shortcoming of institutional work scholarship. Although the practice-based foundation of the concept, and the articulated focus on work emphasises materiality, many researchers attend solely to the use of rhetoric and discursive elements when actors promote alternative institutional arrangements (Goodrick & Reay, 2010; Smets, Morris, & Greenwood, 2012; Zilber, 2013). Along the same lines, Monteiro and Nicolini (2014, p. 2) argue that "the 'work' involved—and its material dimension—are overlooked" in research on institutional work and entrepreneurship. In contrast, this research offers a fine-grained account of the manifold ways actors draw upon language, social relations, material artefacts in the context of institutional transformation (Lawrence et al., 2013; Zilber, 2002).

Focusing on intra-organisational actors, this research also responds to Lawrence and Suddaby's (2006, p. 247) suggestion that a focus on instructional work might open "the black box of [institutional] diffusion" by exploring the dynamics that take place before organisational actors collectively settle on an alternative institutional arrangement and endorse it on the field level. In so doing, this thesis offers a perhaps more realistic account of institutional transformation (or a lack thereof). It could be argued that most micro level institutional research establishes an overly rationalised, deterministic connection between "goal-directed efforts of actors" (Lawrence et al., 2013, p. 1028) and the consequences of those. On the other hand, interpretations that are negotiated and contested in social interactions and the non-economically rational activities and behaviour of actors that are central to institutional thought make such sanitised accounts questionable (Suddaby, 2010; Zilber, 2013). This research more explicitly distinguishes between the actor's intentions to promote an alternative logic, and the consequences of their work (Lawrence et al., 2013; Lawrence & Suddaby, 2006). As I have shown, a group of actors was more receptive to purposeful efforts to promote alternative ideas than others. While incumbents have internalised the dominant logic into

their professional habitus, others adhered only ceremonially and developed a higher degree of reflexivity (Hills et al., 2013; Suddaby et al., 2016). The latter group also increasingly developed a sense of distinctiveness that was based on the newly inspired collective awareness of the institutional constraints they face.

The findings address an undertheorized issue in the highly cited paper by Smets et al. (2012) that served as a major inspiration for this thesis. Smets and colleagues, in line with the argument presented above, demonstrate how hybrid practices within a law firm emerged once English and German lawyers who were more inclined towards an alternative logic from the outset routinely interacted, due to the nature of their work. The empirical data presented and their theoretical arguments suggest, however, that such lawyers described themselves and the work they do as distinctly different from the “majority of lawyers” (Smets, Morris, & Greenwood, 2012, p. 884). While it is not unreasonable to argue that a hybrid practice emerges within such a subgroup, it remains somehow unclear how and to what extent the aforementioned ‘majority of lawyers’ adopted alternative hybrid practices. Smets and colleagues (2012) indeed claim that a diffusion of the hybrid practices occurred at the field level once the German legal association endorsed the role of lawyers as client-centred, commercially oriented advisers. However, to what extent such field-level shift is just proclaimed ceremonial or actually lived by the majority of German lawyer remains open for discussion. One could also argue that lawyers who engage in trans-national legal work constitute an organisational field of their own with relatively little overlap to the traditional legal field.

Coming back to my research, the findings indicate that one must be cautious when evoking the notion of a fully-fledged institutional change in professional fields. Of course, engineering associations and educational curricula increasingly emphasise the importance of commercial acumen, commercial orientation or client service in the engineering profession. Indeed, they have been doing this for decades. Similar to the relative absence of intra-organisational change that was observed within Corgan, however, more anecdotal evidence and literature on engineering identities emphasises the ongoing struggle to incorporate non-technical elements into engineering work. Despite all the proclaimed importance of commercial-orientation, ‘authentic engineering’ still rests on core elements such as tangible outputs, technical excellence and “getting one’s hands dirty” (Murphy, Chance, & Conlon,

2015, p. 6). Also my exploratory interviews with professionals in engineering and law firms, and observers of those professions (e.g., consultants) uniformly highlighted a lack of appreciation and indeed a disregard for the commercial elements of professional work shared by many professionals.

9.2.3 Contribution 3: A holistic view on hybridity in professional contexts

From a more practical perspective, a third contribution of this study is its fine grained, micro level account of radical professional service diversification in relation to the widespread portrayal of multi-disciplinary PSFs as hybrid organisations. As argued throughout this thesis, globalisation, increased competition and technological advances have amplified pressure on all professional sectors. As a response, a tendency towards diversified services and multi-disciplinary practices has long been acknowledged in fields such as accounting (Greenwood & Suddaby, 2006; Greenwood et al., 2002; Suddaby & Greenwood, 2001), law (Flood, 1999; Robinson, 2016) and engineering (Malhotra & Morris, 2009). Practitioners and observers of the professions proclaim that “the walls between professional services are coming down” (Beaton, 2012, para. 1) as PSFs diversify into non-traditional areas of practice.

With legal barriers to multi-disciplinary practices vanishing, this tendency should intensify further. For instance, the introduction of alternative business structures (ABSs) in 2009 allowed non-lawyers in the UK to own or invest in law firms (Rose, 2012). In this context, MacErlean (2015, para. 1) notes a general “trend for law firms to branch into other disciplines”. An example is the international law firm Eversheds which hired Big Four partners to expand its financial service offering, based on a self-proclaimed “unique ability in the market to be a ‘one stop shop’ for regulatory advice” (Clayton, 2015, para. 6). Practitioners and academics also note the re-emergence of large accounting firms in sectors such as law or management consulting (Chin, 2014; McDougald & Greenwood, 2012) as they “revisit their abandoned experiment” (Economist, 2015, para. 8) of multi-disciplinary practices. Along the same lines, Brock (2006, p. 171) notes that “the global growth of multidisciplinary practices [...] seems unabated”, irrespective of recent corporate failures and subsequent legislative changes.

Existing literature has already shed light on the challenges of professional service diversification in pursuit of a multi-disciplinary service offering (Anand et al., 2007; Barratt & Hinings, 2015; Gardner et al., 2008). In this regard, the findings presented in this study offer

an intra-organisational, micro level account of the struggle involved when professional service innovation challenges a field's dominant logic. More importantly, the findings also scrutinise the portrayal of multi-disciplinary PSFs as hybrid organisations. Existing scholarship typically displays organisational hybridisation as a source of strategic advantage, especially "when an organization's mission requires it to engage in complex tasks involving multiple areas of expertise" (Besharov & Smith, 2014, p. 369).

Most alleged benefits of multi-disciplinary organisations are framed around collaboration between actors, cross-fertilisation of knowledge and the provision of better solutions to multi-disciplinary problems. The evoked notion of hybridity refers to the integration of institutional logics and actors who carry those (Pache & Santos, 2010). For instance, Brock et al. (2014, p. 6) argue that the success of professional organisations may rest on their "ability to draw on and combine structures and practices from different logics". Others claim that increasingly complex client problems require multi-disciplinary hybrid organisations able to incorporate multiple logics (Chreim, Williams, & Hinings, 2007; Kirkpatrick & Noordegraaf, 2015). This rather positive portrayal of hybrid organisation is very well articulated in Kirkpatrick and Noordegraaf's (2015, pp. 105–106) proposition that "hybridization could enhance the effectiveness and (trustworthy) performance of professional services [and lead to] more innovation in service delivery [through] multi- and inter-disciplinarity". In essence, all those accounts refer to the notion of blended hybrid organisations (see sections 2.5.2 and 3.4.2) that emphasises "joined-up services, [...] inter-professional collaboration, multi-professional practices, integrated services, and the like" (Noordegraaf, 2011, p. 1360). Indeed, Noordegraaf and colleagues note the "more far-reaching potential 'blending of logics'" (Noordegraaf, 2015, p. 193) whenever "dealing with complex cases has turned into a collaborative affair that needs to be organized and financed" (Kirkpatrick & Noordegraaf, 2015, p. 102).

By drawing on different notions of hybridity (assimilated, amplified separation, or integration) that emerged from practical efforts of actors, this thesis offers more nuanced insights into the intra-organisational representation of institutional logics and related challenges. The Leverage Everything model envisioned at the outset can be presented as a blended hybrid in its focus on integrated, joined-up service delivery. Yet looking at the micro level dynamics involved, stability was not achieved by the integration of competing logics but

through ceremonial enactment of the alternative logic (decoupling) or through compartmentalisation of actors and practices. Those types of hybridity, however, fundamentally diminished the just outlined benefits usually associated with blended form. More importantly, the increased separation between actors can be partly ascribed to the deliberate efforts to promote a blended hybrid organisation. The findings thus call for a more nuanced discussion of hybridity in professional contexts. While existing literature shows how field-level actors promoted hybrid logics at the field level (Greenwood & Hinings, 1996; Greenwood & Suddaby, 2006), they remain silent as to how PSFs internally balance the logics. On the contrary, more anecdotal accounts of “fault lines” (B. Hinings et al., 1999, p. 145) between professional groups or intra-organisational “shifts” (Gabbioneta et al., 2014, p. 23) in logics resulting from multi-disciplinary endeavours point to the failure to do so.

The question remains to what extent MDPs in classic professions have been successfully institutionalised as a stable organisational form. Of course, many engineering firms refer to themselves as multi-disciplinary; this, however, frequently denotes the existence of several professional sub-disciplines such as electrical, mechanical or civil engineers. The challenges involved are arguably far greater when multi-disciplinary refers to a multi-profession workforce (Greenwood & Suddaby, 2006) in a more distinctive sense and to the collaboration of actors in terms of a “fundamentally integrated ‘one-stop shop’” (Paton, 2009, p. 2201). In multi-disciplinary organisations of this sort, professionals who were “socialized within different cognitive and normative orders” (Greenwood et al., 2011, p. 318) would co-produce integrated solutions for interrelated client problems (Kirkpatrick & Noordegraaf, 2015). While the literature shows how PSFs evoked such arguments to obtain regulative endorsement for MDPs (Suddaby & Greenwood, 2005), it remains unclear to what extent such benefits are actually realised. This aspect is articulated very well by David Maister and colleagues (1997) in a practitioner book chapter titled “Why cross-selling hasn’t worked”. The authors differentiate between “traditional cross-selling (where there is no overlap in the delivery of the two distinct services) and integrated selling (of joint-up, multi-disciplinary services), where the client has a chance to receive extra value”. They conclude, however, that most PSFs have focused on the former aspect (that essentially denotes a structured hybrid) and often failed because of the limited benefits such services offer to their clients. Yet, Maister and colleagues maintain that “integrated services have a fair shot at working”.

Scholarship moreover points to legislative elements as the predominant (institutional) barrier for MDPs. These legal constraints are real and have become more important after Enron's downfall, yet as this research shows, the intra-organisational aspects are perhaps even more challenging. Although empirical data is largely missing, anecdotal evidence from preliminary interviews and secondary sources suggest that engineering firms have often failed to establish a substantial management consulting offering, despite the (historic) overlap with this type of work and the absence of legislative barriers. Similar, studies from the North American and British context emphasise regulative elements that have so far limited the diversification strategies of law and accounting firms. On the other hand, increased de-regulation and liberalisation through the introduction of alternative business structures (ABS) are believed to facilitate multi-disciplinary service offerings, and the emergence of new actors "with new business models" (Robinson, 2016, p. 19). While ABS licences are a relatively recent phenomenon in the UK (the first being awarded in 2011) they had been introduced in Australia and New Zealand in the early 2000s ("Alternative business structures," 2012).

And yet, anecdotal evidence shows that PSF diversification remains rather incremental. My exploratory interviews suggested that the accounting firms were fairly unsuccessful in their effort to diversify into legal services despite a significant amount of investment. Likewise, Brock and colleagues (2007) note an attempted merger between KPMG and a local law firm in 2000 that created 'KPMG Legal' in Auckland, New Zealand. The merger failed after a couple of years because of intra-organisational conflicts that emerged between different professional groups. My initial interviews also cautioned against the proclaimed trend of law firms to diversify into all manner of non-legal work because successful cases remain the exception. The findings presented in this thesis are thus not idiosyncratic to Corgan or the engineering profession.

On the contrary, it is reasonable to assume that many types of professional organisations face the same issues Corgan encountered. This was hinted at in the exploratory interviews conducted for this study. Quite tellingly, a long serving, founding partner of a renowned Australian law firm provided the following account of the firm's attempt to diversify into management consulting:

and that consulting business went quite well and in fact the people who were doing the consulting work found that they were only doing the consulting work and they stopped doing the legal work. And then they quite rationally asked themselves: why are we still part of a law firm? We could be doing even better outside of a law firm. So they established their own business under a new brand, doing what they were doing – so not practising law. I think that is actually one of the real challenges with these sorts of ideas; many have tried over the years and mostly it doesn't work; I think if they are successful they will almost always split from the law firm. So you might have co-investment; but I have not yet seen any law firm that has generated a consulting division, or a non-legal division that is successful and remains under the same roof as the law firm.

This in essence constitutes a relatively likely scenario for Corgan's future. As indicated throughout this thesis, many professionals who drew upon the alternative engineering-advisory logic in not rhetorical but more substantive ways left the firm and joined a non-engineering firm where their interests were better served. To reiterate one statement Thomas Yorke, the key informant for this study, made to rationalise this effect: "when they are opened up to how the world of business works they are just so frustrated here because they can't make any change". In many ways, however, Thomas and other actors within Corgan opened those professionals up to "the world of business" through their efforts to introduce and promote an alternative logic within the firm and to problematising the firm's dominant organisational logic.

9.3. Limitations

One limitation of this study is inherently connected with one of its key strengths. It is difficult to judge whether the strategies presented here inspired a broader set of actors to draw upon the alternative logic. Of course, most of them drew upon it in some way; most predominantly in their rhetoric, and some in a more substantive manner. I have also shown that hybrid practices emerged through collaboration and attempts were made to adjust internal processes accordingly. The observed outcomes of micro level efforts are therefore not set in stone and it might well be that, in the long run, the alternative logic becomes the dominant within Corgan.

Zilber (2013, p. 88) notes that institutional creation and transformation are “slow and long processes”. To evaluate whether the efforts observed resulted ultimately in a new prevailing logic within Corgan and at the field level would require a longitudinal research designs that cover years or decades (Dacin et al., 2002; Suddaby, 2010). Despite my six months observation and my access to video recording that covered earlier events, insights into the individuals’ activities and their consequences might consequently be distorted by capturing a snapshot image. Documenting the actual emergence of a new dominant logic within the organisation or even in the field, however, did not constitute my primary research interest.

Second, although the participant observation method enabled me to build trust and to demonstrate some practical value, it also limited my time for observations and reflections. In the first two months of the field work I spent a considerable part of each day building and discussing the Excel model I developed. This limited the time I had to conduct interviews, transcribe audio recordings or to evaluate them in more detail (apart from the initial reflections I had made). My active involvement in meetings also limited possibilities to observe the behaviour of actors. The transcription of 150 hours of voice recording ‘by hand’ took a considerable amount of time. Although it enabled me to develop a very good ‘feel’ for the data, the time I invested with this task was substantial. It might have been better, on reflection, to use a transcription service to have more time for analysing the data during the fieldwork. Also, spending not five but only two or three days a week at the research site would have allowed more time for an in-depth reflection on observations and emerging ideas. On the other hand, in spending less time at the research site, I might have missed important ad-hoc events and would have struggled to produce the outputs that I promised at the outset.

Finally, limitations of single-case studies are typically associated with their lack of generalisability. These concerns are, however, based on diverging epistemological and ontological assumptions that underpins the research. Given the ever changing, and subjective notion of reality that underpin interpretivist research, “statistical generalization” (Yin, 2003, p. 31) is neither claimed nor was it attempted at the outset of this study. Rather, this thesis builds on “naturalistic generalization” (Cornelissen, 2011, p. 134) that establishes a resonance of findings with existing theories and the potential to detect similarities with other cases. Thick descriptions of findings allow others, both researchers and practitioners, to make a reasoned judgement as to what extent the results are transferable to other contexts (Denzin & Lincoln,

2000a; Guba & Lincoln, 1982; Lincoln & Guba, 1985). Also, while I have demonstrated that many of the observed practices are not idiosyncratic to Corgan but reflective of the broader field, potentially significant differences from other organisations embedded in the same field (engineering consulting) or in the broader field of professional services need to be considered (Malhotra & Morris, 2009; von Nordenflycht, 2010). In contrast to Corgan, for instance, most large engineering firms are public corporations and some informants argued that leaders in those organisations have more power to impose change top-down. The focus on tangibility and scientific knowledge is also less pronounced in other fields such as law and accounting (Malhotra & Morris, 2009; Malhotra et al., 2006). Conversely, the observed emphasis on 'productivity' (or 'billable hours') has been noted as a barrier for innovation in other professional sectors (Smets, Morris, & Malhotra, 2012); also anecdotal evidence on failed attempts to establish 'one-stop-shops' for professional services suggests that non-engineering PSFs have encountered similar issues.

9.4. Implications for future research

Some implications for future research are related directly to the contributions and the limitations that were just outlined. First, I have shown that there are considerable differences in the ways institutional logics and hybrid actors are conceptualised in the literature. While the term institutional logics has "become the new buzzword in institutional research" (R. Meyer & Höllerer, 2014, p. 1227) many contributions seem to disregard Friedland and Alford's (1991) initial conceptualisation of multiple societal logics. In turn, the notions of a dominant institutional logic, as a method of analysis to differentiate organisational fields, fails to add significant insights to the long-established conceptualisation of institutional pillars (e.g., Scott, 1995; Thornton & Ocasio, 2008; Reay & Jones, 2016; DiMaggio & Powell, 1983). A field's dominant logic is thought to be reflected in regulatory, normative and socio-cultural institutions and, in turn, to inspire particular sets of homogenous structures, practices and behaviours in a field (Muzio & Faulconbridge, 2013). This view of institutional logics is, arguably, very similar to traditional neo-institutional ideas (e.g., DiMaggio & Powell, 1983, 1991) and fails to account for the multiplicity of institutional logics that is the central point of difference in Friedland and Alford's (1991) meta-theory. I would argue that the institutional logics perspective only adds additional value when scholars focus their attention onto the inherent tension between the institutional expectations that actors face in any social situation

(Greenwood et al., 2014; R. Meyer & Höllerer, 2014). This can refer to the ways actors handle such instances of institutional complexity, both at the individual and the organisational level, or to the transformative action that can emerge from those experiences.

Studies under the umbrella term hybridity have shifted their attention in this direction, yet the conceptualisation of hybrid actors varies significantly. Some scholars have recently synthesised this literature, identifying various ideal-typical response strategies to competing institutional logics (e.g., Greenwood et al., 2011; Kraatz & Block, 2008; Pache & Santos, 2010, 2013b; Skelcher & Smith, 2015). First, those warrant empirical attention, particularly on the micro level when individuals experience institutional contradictions. Similar to this thesis, future research can draw upon those typologies to provide more conceptual clarity when they evoke the term hybrid actor empirically. As I have shown, hybridity differs significantly when conceptualised in terms of compartmentalisation or as an integration of multiple logics. Much existing scholarship speaks of hybridisation when actors draw upon alternative logics in a merely rhetorical way or when a new organisational subunit is established that aligns with a new logic (e.g., Heinze & Weber, 2016). This notion of hybridisation does, however, undermine the benefits that are typically associated with hybrid organisations and individuals. The insights presented in this thesis encourage more nuanced research in the context of organisational hybridisation. The positive notion of blended hybridisation ultimately requires that a critical number of intra-organisational actors to draw upon an alternative logic in a more substantial way (Schildt & Perkmann, 2016). Future research can attend in particular to the inherent tension between compartmentalisation and diffusion that this thesis emphasises. Implicit in many micro level studies on hybridisation is that actors who draw upon an alternative logic need to be in some way separated from the dominant logic governing their field (Kellogg, 2009; Smets, Morris, & Greenwood, 2012). In turn, scholars also stress continued interaction of organisational members who carry diverse logics as facilitative of hybridisation (Battilana et al., 2015; Heinze & Weber, 2016; Zilber, 2017).

Building on those suggestions, future research can also explore to what extent the findings from this single-case study are applicable in other contexts. Based on the growing recognition that institutional complexity constitutes the norm, rather than an exceptional phenomenon (Greenwood et al., 2011), and that hybridity can be a source of advantage for

individuals and organisations alike (Pache & Santos, 2013b; Schildt & Perkmann, 2016), more research into the tactics and mechanism involved in promoting or embracing hybridity is warranted in a variety of settings. Although I have shown that the findings presented in this study are not idiosyncratic to the studied organisation, some of the strategies identified might be more or less relevant in other contexts. Also, the power of actors to force an alternative logic onto others was a markedly absent factor in my study due to the very high degree of autonomy enjoyed by professionals at Corgan. In other organisations (e.g., publicly owned PSFs or 'non-professional' organisations) the importance of hierarchal power might be more pronounced.

In the context of PSFs, however, the findings presented call for more critical research into the very notion of multi-disciplinary professional organisations. The positive portrayal of blended hybridity that underpins much of the literature ultimately points to the fruitful integration of a diverse array of occupations that are "motivated and conditioned by different logics" (Greenwood et al., 2011, p. 323). So called "classic PSFs" (von Nordenflycht, 2010, p. 165), such as law, engineering and even accounting firms tend to be dominated, however, by one profession or are characterised by strict separation between professional groups. More research into classic PSFs who have actually managed to establish a stable multi-disciplinary business model, or who have failed to do so, is warranted. Anecdotally, many mature PSFs struggle with such attempts, despite considerable efforts invested. On the contrary, some start-ups do seem to have managed the integration of accountants, management consultants and engineers that deliver joined-up services.

9.5. Concluding remarks

Writing this thesis was quite a journey, with many positive experiences and interesting insights gathered along the way. There were naturally some frustrations, cul-de-sacs and confusions that made me question myself and the research topic I had chosen. In hindsight, most of the PhD-related anguish in the last couple of years emerged from the strong connection I had built with professionals at Corgan, and the fact that I started to actually care the firm and the issues it faces. That made my initial analysis too focused on 'solving' the barriers the firm encounters in the implementation of the Leverage Everything strategy. This

'problem solver' focus was to a certain extent related to the contemporary emphasis on change and agency that dominates institutional scholarship.

Most publications that draw on an institutional perspective in contemporary management journals claim to study institutional change; especially those who take a micro level approach, relate such transformations towards an intended institutional outcome to the purposeful and skilful activities of institutional entrepreneurs (Suddaby, 2010). During initial data collection and analysis, I similarly focused on the efforts of individuals within Corgan to promote what could be framed as profound institutional change. I have shown throughout this thesis, however, that the observed change was often merely superficial and rhetorical. One could argue that the actors within Corgan did not apply the right tools or tactics to make their efforts more consequential. On the other hand, all activities, rhetorical arguments, strategies and artefacts that actors drew upon were not dissimilar to the ones that other scholars describe in their studies of institutional change. Meyer and Höllerer (2014, p. 1230) note in this context that "at a time when management research in general celebrates agency, entrepreneurship, and innovation, differences and deviation seem more attractive." This thesis consequently somewhat calls for more reflexivity amongst scholars who claim to study "institutional change" irrespectively of how incremental a change might be (Suddaby, 2010). As I have argued, there are significant differences as to whether change refers to instances where actors draw upon an alternative logic in a rhetorical fashion; where structural elements are adjusted to signal superficial conformity to a new logic; or where practices and ascribed meanings transform in a more fundamental way.

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APPENDIX A: PROMPTS USED FOR INITIAL INTERVIEWS

The following question guided the initial interviews conducted at Corgan. The specific questions depended on the role of the informant and his/her position in the hierarchy.

- What is your educational background and your current role in the firm?
- Can you tell me a little bit about the history of the firm/your specific business line/the service you deliver?
- What are the challenges the firm/your specific business line/the service you deliver faces at the moment?
- How do the non-traditional services differ from the existing ones? Who are the main competitors for the service you deliver?
- What are the main barriers you face in delivering non-traditional engineering services? To what extent does the firm support the non-traditional services?
- How do you deal with these barriers?
- Whom else could I interview in this context? Is there anything you would like to ask?