

**Institutional Theory:
Contributing to a Theoretical Research Program**

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Institutional theory attends to the deeper and more resilient aspects of social structure. It considers the processes by which structures, including schemas, rules, norms, and routines, become established as authoritative guidelines for social behavior. It inquires into how these elements are created, diffused, adopted, and adapted over space and time; and how they fall into decline and disuse. Although the ostensible subject is stability and order in social life, students of institutions must perforce attend not just to consensus and conformity but to conflict and change in social structures (Scott 2004b).

The roots of institutional theory run richly through the formative years of the social sciences, enlisting and incorporating the creative insights of scholars ranging from Marx and Weber, Cooley and Mead, to Veblen and Commons. Much of this work, carried out at the end of the nineteenth and beginning of the twentieth centuries, was submerged under the onslaught of neoclassical theory in economics, behavioralism in political science, and positivism in sociology, but has experienced a remarkable renaissance in our own time. (For reviews of early institutional theory, see Bill and Hardgrave 1981; Hodgson 1994; Scott 2001)

Contemporary institutional theory has captured the attention of a wide range of scholars across the social sciences and is employed to examine systems ranging from micro interpersonal interactions to macro global frameworks. Although the presence of institutional scholars in many disciplines provides important opportunities for exchange and cross-fertilization, an

astonishing variety of approaches and sometime conflicting assumptions limits scholarly discourse.

Given the complexity and variety of the current scene, I restrict attention in this chapter to more recent institutional work carried out by organizational sociologists and management scholars. And, within this realm, I concentrate on macro perspectives, examining the structure of wider environments and their effects on organizational forms and processes. (For a related approach, with emphasis on the micro-foundations of institutional theory, see Zucker, chap. xx, this volume. For closely related chapters employing transaction cost economic and evolutionary economic approaches, see Williamson, Chap. xx, this volume and Winter, Chap. xx, this volume.) Taken in its entirety, I believe that this body of work constitutes an impressive example of a “cumulative theoretical research program” (Berger and Zelditch 1993) that has grown and matured over the course of its development. To understand, interpret, and advance this program has been central to my own intellectual agenda during the past three decades.

Building a Theoretical Argument

Early Insights

At the University of Chicago where I completed my doctorate degree, I studied and worked with Everett C. Hughes as well as with Peter M. Blau. Hughes first directed my attention to the institutional structures surrounding and supporting work activities, in particular to the role of unions and professional associations in shaping occupations and organizations (Hughes 1958). Although

my dissertation provided data to support the examination of the contextual effects of organizations on work groups (Blau and Scott 1962/2003), its principal theoretical focus was on the tensions arising between professional employees and bureaucratic rules and hierarchical supervision (Scott 1965, 1966). I viewed this topic then and now as an important instance illustrating two competing visions—today, I would say alternative “institutional logics”—as to how best to rationalize a set of activities.

I pursued my interest in competing conceptions of appropriate work structure with colleagues at Stanford during the 1960s in an examination of organizational authority systems (Dornbusch and Scott 1975). In studies of a variety of organizations, we examined discrepancies between preferred and actual authority systems as well as between workers with varying degrees of power to enforce their preferences. I concluded that work arrangements are not preordained by natural economic laws, but are shaped as well by cultural, social, and political processes.

A Bolder Conception

However, it was not until my collaborative work with John W. Meyer, together with colleagues in the School of Education at Stanford during the 1970s, that I began to recognize the larger sense in which institutional forces shape organizational systems. Our early research designs were drawn from the then-reigning paradigm, contingency theory (Lawrence and Lorsch 1967; Thompson 1967/2003), as we examined the effects of employing more complex instructional methods (“technologies”) on classroom and school structure (Cohen et al. 1979).

But trying to learn from the data, we recognized the limitations of existing theories and began to entertain alternative explanations for sources of structuring. Drawing on the insights of the early social theorists, Durkheim (1912/1961) and Weber (1924/1968) as well as the ideas of Berger and Luckmann (1967), Meyer (1970) suggested that much social order is a product of social norms and rules that constitute particular types of actors and specify ways in which they can take action. Such behaviors are not so much socially influenced as socially constructed.

These arguments were elaborated and applied by Meyer, me, and a number of collaborators to the analysis of educational systems (Meyer 1977; Meyer and Rowan 1977; Meyer et al., 1978; Meyer and Scott 1983; Meyer, Scott, and Deal 1981; Meyer et al. 1988), but quickly generalized to apply to the full range of organizations. Consistent with conventional accounts, organizations were recognized to be “rationalized” systems—sets of roles and associated activities laid out to reflect means-ends relationships oriented to the pursuit of specified goals. The key insight, however, was the recognition that models of rationality are themselves cultural systems, constructed to represent appropriate methods for pursuing purposes. A wide variety of institutional systems have existed over space and time providing diverse guidelines for social behavior many of which sanction quite arbitrary behavior, but the modern world is dominated by systems embracing rationality and these, in turn, support the proliferation of organizations. Norms of rationality play a causal role in the creation of formal organizations (Meyer and Rowan 1977).

Many of the models giving rise to organizations are based on “rationalized myths”—rule-like systems that “depend for their efficacy—for their reality, on the fact that they are widely shared, or have been promulgated by individuals or groups that have been granted the right to determine such matters” (Scott 1983: 14). The models provide templates for the design of organizational structures: “the positions, policies, programs, and procedures of modern organizations” (Meyer and Rowan 1977: 343). These models exert their power, not via their effect on the task activities of organizational participants—work activities are often decoupled from rule systems or from the accounts depicting them—but on stakeholders and audiences external to the organization. Their adoption by the organization garners social legitimacy.

An East-Coast Variant

While these ideas were under development at Stanford, across the country at Yale University, two other sociologists, Paul M. DiMaggio and Walter W. Powell, were developing their own variant of institutional theory. Drawing on network arguments, both connectedness and structural equivalence (White, Boorman, and Breiger 1976), DiMaggio and Powell provided a related explanation to account for processes that “make organizations more similar without necessarily making them more efficient” (1983: 147). Whereas the Stanford models privileged widely shared symbolic models, DiMaggio and Powell stressed the importance of palpable network connections that transmitted coercive or normative pressures from institutional agents, such as the state and

professional bodies, or mimetic influences stemming from similar or related organizations.

At about the same time, researchers on both coasts recognized the value of concentrating attention on more delimited sets of organizations. Whereas early formulations (e.g., Meyer and Rowan 1977) advanced arguments applicable to all organizations, DiMaggio and Powell's (1983) concept of "organizational field" (influenced by Bourdieu's (1977) notion of "social field") and Meyer's and my (Scott and Meyer 1983) concept of "societal sector" (influenced by the work of public policy analysts and community ecologists) simultaneously recognized that both cultural and network systems gave rise to a socially constructed arena within which diverse, interdependent organizations carry out specialized functions. It is within such fields that institutional forces have their strongest effects and, hence, are most readily examined.

Early empirical work centered around three themes: factors affecting the diffusion of institutional forms (Tolbert and Zucker 1983; Hinings and Greenwood 1988; Dobbin et al., 1988; Meyer et al 1988), the disruptive effects of conflicted or fragmented institutional environments on organizational forms (Meyer, Scott and Strang 1987; Powell 1988), and the processes at work in constructing the rules and logics unpinning an organizational field (DiMaggio 1983; Leblebici and Salancik 1982). Arguments were not only being crafted but, increasingly, confronted with data. Institutional theory had reached the stage of a promising adolescent (Scott, 1987).

Constructing a Comprehensive Framework

I was invited to spend the academic year 1989-90 as a Fellow at the Center for Advanced Study in the Social and Behavioral Sciences, a national center, albeit located on the outskirts of Stanford University. This year-long fellowship, enjoyed in the company of more than fifty other scholars, is quite rightly prized and has proved beneficial to many in their intellectual pursuits. Having spent my previous years furiously teaching, researching, and writing (as well as administering departments and programs), I elected to spend the bulk of my fellowship year reading. I knew that institutional theory had multiple roots and was being pursued in varied ways across the social sciences. I wanted to find out if there were commonalities among these approaches, and determine whether institutional theory could be contained within a comprehensive conceptual framework. That year I worked to steep myself in the wide-ranging literature of institutional theory, including older and more recent versions as pursued by economists, political scientists, and sociologists.

Attempting to bring some coherence to the enterprise, the approach I adopted was to construct what Tilly (1984: 81) terms an “encompassing” framework, that incorporates related but different concepts and arguments and locates them within the a broader theoretical system. I postulated that institutions are variously comprised of “cultural-cognitive, normative and regulative elements that, together with associated activities and resources, provide stability and meaning to social life” (Scott 2001: 48; see also, Scott 1995: 33). Although institutional scholars vary in the relative emphasis they place on

these elements and in the levels of analysis at which they work, all recognize the common theme that social behavior and associated resources are anchored in rule systems and cultural schema. Relational and material features of social structures are constituted, empowered and constrained by the virtual elements, which they, in turn produce and reproduce (Giddens 1979; Sewell 1992).

As summarized in Table 1, the Pillars framework asserts that institutions are made up of diverse elements that differ in a number of important ways. They posit different bases of order and compliance, varying mechanisms and logics, diverse empirical indicators, and alternative rationales for establishing legitimacy claims. Although all institutions are composed of various combinations of elements, they vary among themselves and over time in which elements are dominant. Different theorists also tend to privilege one or another class of elements. Thus, most economists and rational choice theorists stress regulative elements (e.g., Moe 1984; Williamson 1975; North 1990); early sociologists favored normative elements (Hughes 1939; Parsons 1934/1990; Selznick 1949); and more recent organizational sociologists and cultural anthropologists emphasize cultural-cognitive elements (e.g., Zucker 1977; DiMaggio and Powell, 1991; Douglas 1986; see also, Scott 2001: 83-88).

[Table 1 about here]

The framework outlined in Table 1 is not a theory, but a conceptual schema. It depicts and differentiates among three complexes of ideas, each of which provide the ingredients for an alternative conception of and explanation for institutions. The framework attempts to capture both the commonality and the

diversity of theorizing about institutions, past and present. It suggests not simply that theories differ, but indicates how they differ. It does not provide an integrated theory of institutions but points out directions for pursuing such a theory. It is intended to better enable us to compare and contrast the diverse conceptions of institutional theory advanced, as well as to identify the varying levels at which these arguments are being pursued.

While my own theorizing and research has emphasized the cultural-cognitive elements as a basis for institutional analysis, I see great value in work favoring the regulative or the normative approaches. Indeed, much of the research in which I have participated considers the impact of governmental organizations, legislation and court decisions—all primarily regulative agents—on the structure and activities of organizations. And I continue to be impressed by—and to study—the power of normative agents, such as professional associations, in shaping organizational forms and processes. All three elements are at work, albeit in varying ways, to stabilize social behavior—from pair-wise interactions to world-wide systems.

Shaping and Correcting the Agenda

Arguments and approaches devised during the formative period when institutional theory was being revived and constructively connected to organizations, roughly 1975-1985, have continued to affect the development of the field. We should never underestimate the power of foundational works in shaping the course of subsequent developments in a social arena. Many social

phenomena, including social theory, exhibit path-dependent effects. While most of the effects have been salutary some, in my view, were not. I consider three areas where reconsideration and corrections were called for, and, to a considerable extent, have occurred. (See also, Scott, forthcoming).

Toward More Interactive Models

Too much early theorizing and research on institutions posited “top-down” models of social influence. Scholars examined the various ways in which rules, norms, and shared beliefs impacted organizational forms. Such a focus is understandable since a necessary condition for calling attention to the importance of institutions is to demonstrate their influence on organizations. However, the language used was, predominantly, that of “institutional effects,” as if a given set of environmental forces was able to exert influence in a unilateral manner on compliant organizations. Two corrections were required, and both are now well underway.

First, we needed to recognize that institutional environments are not monolithic, but often varied and conflicted. Authoritative bodies may diverge—indeed, in liberal states, they are often designed to do so, providing “checks and balances”—and schemas and models may compete. The elements of institutions—regulative, normative, cultural-cognitive—may not be aligned, and one may undermine the effects of the other. The boundaries of organizational fields are often vague or weak, allowing alternative logics to penetrate and support divergent models of behavior. Suppressed groups and interests may mobilize and successfully promote new models of structure and repertoires of

acting. Some of the most interesting work of the past two decades has helped to unpack the multiplicity of institutional arrangements, both between and within a given field, examining the intersection of structures, and documenting the transposability of schemas, as actors and ideas flow across field boundaries (Friedland and Alford 1991; Sewell 1992). Empirical studies of these processes range from examining the effects of the fragmentation of U.S. state structures (Meyer, Scott and Strang 1987; Abzug and Mezias 1993); to competition among alternative professional models (DiMaggio 1991); to conflicts between faltering and emergent regimes, e.g., the rise of market models in socialist states (Campbell and Pedersen 1996; Stark 1996). Clearly, competing rules or schema open up possibilities for choice and bargaining among subordinate actors.

Second, while recognizing that actors are institutionally constructed, it is essential to affirm their (varying) potential for reconstructing the rules, norms and beliefs that guide—but do not determine—their actions. Barley's (1986) influential study of the variable response of actors in hospitals to the introduction of (presumably determinant) technologies, helped to open the door for the consideration of power exercised by "subjects", and was reinforced by DiMaggio's (1988) essay calling for the reintroduction of "agency"—the capacity to "make a difference" in one's situation—into institutional theorizing. Gradually, the language began to shift from discussions of institutional "effects" to institutional "processes"; and theorists began to craft recursive models, recognizing "bottom-up" modes of influence, to supplement or replace prevailing top-down models (Scott 1995; 2001).

The introduction of agentic actors was required at multiple levels. Rather than positing the presence of “widely shared” belief systems or norms, it was important to specify who—which actors—held the beliefs or were enforcing the norms. Similarly, as noted, analysts needed to recognize that actors subject to institutional influences are capable of responding in a variety of ways. The latter effort was reinforced and advanced by Oliver (1991), who recognized the value of linking resource-dependence arguments with institutional models. She suggested that organizations, and their leaders, might not simply respond to institutional demands with passive compliance (as suggested by prevailing theories) but could employ a range of “strategic” responses—reactions that included acquiesce, but included as well, compromise, avoidance, defiance, and manipulation. Amidst the rush by analysts to embrace strategic arguments, Goodrick and Salancik (1996), introduced an appropriate, cautionary note to the effect that well-established beliefs and standards do not countenance strategic responses. Still, a probably salutary effect of Oliver’s initiative was to help restore institutional arguments to favor within professional schools. (Professional schools have little use for theories that deny or severely constrain the ability of organizational managers to affect the environments in which their organizations function.)

Of course, the two corrective arguments interact. A more conflicted or ambiguous environment allows for greater opportunity for strategic and agentic behavior. In addition, recognition of agency at multiple levels encourages attention to the variety of interactive processes at work between actors within

organizational fields as they engage in interpretation, sense-making, translation, and negotiation activities (Edelman 1992; Dobbin et al., 1993, Weick 1995).

In these developments, institutional theory mirrors trends generally present in theorizing about social structure and action from the classical to contemporary theorists (Alexander 1983). Interactive and recursive models increasingly have replaced one-way, determinist arguments. In my view, the work of Giddens (1979; 1984) has been particularly helpful to latter-day social scientists in developing a more balanced conception of the relation between freedom and order.

Conditionalizing De-coupling

The Stanford camp's initial theoretical formulation proposed that the formal structures produced in response to institutional demands are routinely decoupled from technical work processes (Meyer and Rowan, 1977; Meyer, Scott and Deal 1981). While the notion of "loose coupling" among structural elements has a long and rich history in organization studies (Weick 1976; Scott 2003b: 88-89), *decoupling* carried stronger intellectual and affective baggage, striking many critics as connoting deception, duplicity, and merely "ceremonial" conformity (e.g., Perrow 1985; Hall, 1992).

An enduring truth associated with the original argument is that modern organization structures are a product not only of coordinative demands imposed by complex technologies but also of rationalized norms legitimizing adoption of appropriate structural models. Indeed, these can be viewed as two quasi-independent sources of structures, in the absence of which, organizing efforts

are crippled (Scott and Meyer 1983). Additionally, each source is associated with a different layer of structure. Following Parsons (1960) and Thompson (1967/2003), I argued that technical forces primarily shape the “core” functions, including work units and coordinative arrangements, while institutional forces shape the more “peripheral” structures, such as managerial and governance systems (Scott 1981b: 2003: chaps. 10-11). Organizations reflect, and their participants must work to reconcile, two somewhat independent sources of structuring.

That being said, I believe our early arguments regarding the extent and degree of decoupling were overstated. While organizations can and do decouple work activities from accounting, control, and other review systems, the extent to which this occurs varies greatly, both over time and among organizations. Some institutional requirements are strongly backed by authoritative agents or by effective surveillance systems and sanctions. Others receive sympathetic responses from organizational participants in positions to implement them. Indeed, some tap into—and/or construct—the basic premises and organizing logics employed by key organizational players. Response will also vary depending on which elements are predominant: regulative systems, that depend more on external controls—surveillance and sanctioning—are more likely to elicit strategic responses. Indeed, research has shown that compliance to regulations varies as a function of the resources devoted to enforcement (Mezias 1995). Normative elements, which rely more on internalization processes, are less likely to induce only lip service or resistant responses; and as for cultural-cognitive

elements, which rest on more deeply set beliefs and assumptions, strategic responses are, for many, literally “unthinkable.” In this vein, for many institutional theorists, “to *be* institutional, structure must generate action” (Tolbert and Zucker 1996: 179).

Westphal and Zajac (1994) conducted a model empirical investigation examining not only the extent, but the causes, of decoupling in organizations. They studied the behavior of 570 of the largest U.S. corporations over two decades during the period when many such firms were adopting long-term incentive plans, attempting to better align incentives for executives with stockholders’ interests. Following the lead of many earlier studies of the diffusion of structural models and procedures, they sought to identify organizational characteristics associated with adoption, both early and late, and non-adoption. However, rather than assuming decoupling, they assessed the extent to which organizations actually implemented changes in executive compensation programs. Finding such variation, they sought to examine which organizational characteristics predicted the extent of implementation observed. Decoupling was not treated as a (likely) response to pressures from the institutional environment. Rather, it was treated as a variable—a response that differed among organizations and that, in turn, was in need of being explained. They found both similar and divergent factors to account for adoption and implementation: for example, CEO influence was positively associated both with adoption and with *non*-implementation; while firm performance was negatively associated with adoption but not correlated with implementation.

Reconsidering Rationality

The classic founding statements linking organizations with latter-day versions of institutional theory struck a common chord in contrasting institutional with rational or efficiency-based arguments. Thus, according to Meyer and Rowan (1977: 355): “Formal structures that celebrate institutionalized myths differ from structures that act efficiently . . . Categorical rules conflict with the logic of efficiency.” DiMaggio and Powell (1983: 147) concur, asserting that institutions produce structural change “as a result of processes that make organizations more similar without necessarily making them more efficient.” These and related arguments focusing on “myths,” “ceremonial behavior,” and mindless conformity, placed sociological institutionalists in danger of focusing exclusively on the irrational and the superficial aspects of organization.

In collaborative work appearing at about the same time (Scott and Meyer 1983), I worked with Meyer to introduce the intermediate argument noted above, that rational (or technical) performance pressures are not necessarily opposed but somewhat orthogonal to institutional forces—each a source of expanding rationalized structural arrangements. We asserted that *all* organizations confront both types of pressure, although the strength of these forces varies across organizational sectors. Thus, educational organizations are typically subject to stronger institutional than technical pressures, whereas the reverse is the case for many industrial concerns. Other organizations, such as banks and nuclear power plants, confront strong pressures of both types, effects that produce quite complex structures; while a final group of organizations, such as child care

centers in the U.S., lack strong technical and institutional pressures (and supports), and so tend to be weak and instable.

A broader, and more satisfactory, interpretation of the relation between rational and institutional forces began to appear during the 1990s, as the ideas of a number of scholars independently converged toward a new formulation. A conception emerged of the role of institutional arrangements in constructing rationality, not just in the absence of effective instrumentalities, but as a framework for defining and supporting the full range of means-ends chains. A concern with effectiveness, efficiency and other types of performance measures does not exist in a vacuum but requires the creation of distinctions, criteria, common definitions and understandings—all institutional constructions. The broader cultural-cognitive, normative and regulatory aspects of institutions shape the nature of competition and of markets, as well as the meanings of effective performance and efficient operation (Fligstein 1990; Orrù, Biggart, and Hamilton 1991; Powell, 1991; Whitley 1992). In sum, institutional frameworks bound and define rational arguments and approaches.

It remains true, however, that within these broader frameworks other types of institutional provisions may support the creation of structures that are more attuned to insuring accountability, gaining legitimacy, and securing social fitness than to directly improving the quality or quantity of products and services. Such requirements, while not directed related to core technologies, can nevertheless make important contributions to organizations adopting them, increasing

recognizability, acceptability, and reputation. Institutions are varied in their effects as well as in the levels at which they operate.

In addition to reorienting the relation between rational and institutional arguments, many contemporary scholars are working to broaden the conception of rationality. To supplement and amend narrow utilitarian arguments, they propose to recognize the rationality that resides in rule-following, procedural, and normatively oriented behavior (Langlois, 1986; March and Olsen 1989; DiMaggio and Powell 1991; Scott 2001). Much wisdom is instantiated in conventions, habits, and rules. Instrumental logics must be supplemented with social intelligence.

The problems posed by the persistence of errors associated with the founding period of an intellectual perspective are not unique to institutional theory. It is all too common that errors present at the origins prove difficult to correct. They seem to be built-in to the fabric of the enterprise. And, it takes considerable energy and, even, courage to confront them. But, I think, this is one of the important roles of empirical research in building theory. When predictions are confounded by findings, it suggests the need to reexamine premises and assumptions, as well as propositions and logic. Empirical research does not just test arguments; it provides the bases for reformulating them, sometimes in quite basic ways.

Broadening the Agenda for Studying Institutional Change Processes

Convergent and Disruptive Change

In an important sense, a concern with institutional change has been present in both the theoretical and empirical agenda of institutional theorists from the beginning of the modern period. However, virtually all early work focused on “convergent” change—explanations for and evidence of increasing similarity among organizational structures and processes. Because of the prevailing emphasis on top-down models, it was presumed that institutional arguments were primarily of use to explain increased conformity to a given rule or model. Increasing isomorphism was taken to be the central indicator that institutional processes were at work (Scott 2001). Thus, early theory and research focused on the diffusion of existing institutional models (e.g., Tolbert and Zucker 1983; Baron, Dobbin and Jennings 1986). Such a focus, of course, excludes crucial phases in the institutionalization process (Tolbert and Zucker 1996), which has, necessarily, a beginning and an end as well as a middle.

Origins and Endings

This focus on the middle moment was soon supplemented by attention to the origins of institutional models. In his influential analysis of the formative stages of “high culture” organizations (art museums), DiMaggio (1991) examined the often contentious processes at work as actors advocated alternative models around which to organize. DiMaggio wisely observed that lack of attention to such early structuration processes

provides a one-sided vision of institutional change that emphasizes taken-for-granted, nondirectional, nonconflictual evolution at the expense of intentional (if bounded rational), directive and conflict-laden processes that

define fields and set them upon trajectories that eventually appear as “natural” developments to participants and observers alike (1991: 268).

A growing number of investigators have recognized the advantages of adopting institutional arguments to examine the origins of new types of organizations—new models or archetypes for organizing—and, relatedly, new organizational fields or industries (Aldrich and Fiol 1994; Dezalay and Garth 1996; Greenwood and Hinings 1993; Suchman 1995; Ventresca and Porac 2003). This interest connects productively to the on-going work of organizational ecologists who, like early institutional theorists have focused more attention on the diffusion of successful forms than on the origin of forms, thereby adding a population genetics (the creation of new forms) to a population ecology (competition among existing forms) (Baum 1996; Suchman 2004). It also has begun to usefully engage institutionalists with the valuable work of political scientists, sociologists, and social movement theorists who have specialized in studying contending interests, the emergence of suppressed groups, and the development of novel models of organizing and repertoires of action (Clemens and Cook 1999; Clemens and Minkoff, 2004; Davis, et al 2004).

Current research efforts have begun to fill in the third, missing phase of the arc of institutionalization, examining the onset of deinstitutionalization and the collapse of structures and routines. Zucker (1988) has long insisted that institutional persistence is not the rule, but the exception. Like all systems, institutional arrangements are subject to entropic forces, and require the continuing input of energy and resources to prevent decay and decline.

Organizational forms and fields erode as well as emerge. It is instructive to observe both the beginning and the end since in both the construction and deconstruction phases, conflict and agency are likely to be more visible.

Along with others, I have devoted considerable effort in recent years to examining the processes involved when once-stable institutional arrangements are challenged, undermined, and, gradually, replaced with different beliefs, rules, and models. For a recent study, my colleagues and I selected as our subject the field of health care delivery services in the U.S. during the second half of the twentieth century because this arena, once so stable, has undergone considerable transformation during recent decades (Scott et al., 2000; Scott 2004a). In tracking institutional change empirically, we found it advisable to focus on three measurable components—*types of actors* or organizing models (a combination of cultural-cognitive and normative elements), *institutional logics* (primarily cultural-cognitive elements) and *governance structures* (a combination of regulative and normative elements). Charting systematic change over several decades in the types and numbers of actors (individual roles, organizational forms and their interrelations), in the nature of institutional logics (the organizing principles that provide work guidelines to participants [Friedland and Alford 1991]), and in the governance structures (the private and public controls utilized in overseeing a field), provided a revealing class of indicators for depicting institutional change.

Like other comparable studies (e.g., Campbell and Pedersen 1996; Holm 1995; Stark 1996 Thornton 2004), we found deinstitutionalization and

reconstructive processes to be fueled by both exogenous and endogenous forces, and reconstruction to reflect both novel elements—newly invented or imported from outside the field—and new combinations of existing elements. And, like these studies, we found evidence that ideas and other types of conceptual models increasingly are carried not only across sector or field, but also across national boundaries (Dacin, Goodstein, and Scott 2002). During the current time, for example, neo-liberal logics are penetrating domains (e.g., professional, public and nonprofit) formerly insulated from market and managerial logics (Campbell and Pedersen 2001).

These and related studies suggest that the major contributions of institutional theory to organizational studies may still lie ahead. Institutional concepts and arguments seem ready-made to address the complex processes now unfolding as inhabitants of our planet become more interdependent.

Onward and Upward

Expanding Facets and Levels

I have long argued that the most important intellectual revolution shaping contemporary organizational studies has been the introduction of open systems models (Scott 2003b; 2004c). A growing recognition of the pervasive importance of the wider environment for the structure and functioning of organization has progressed since the early 1960s and continues to this moment. Three somewhat distinct developments may be distinguished. First, there has been a growing awareness of the multiple and varied facets of the environment, as an

early recognition of technical features and material resources expanded to include political and relational interdependencies, then moved to incorporate symbolic and cultural features. Second, the levels at which units of analysis are defined have expanded from the *individual* or *group* within an organization, to the *organization* itself, to the organizational *set* (a systems of actors linked by the exchange of commodities and services), to the organization *population* (the aggregate of organizations carrying on similar functions and hence competing for the same resources), to the organization *field* (an interdependent collection of similar and dissimilar organizations operating in the same domain).

Non-local Knowledge

Third, and less widely recognized, today's organizations are more open to and affected by non-local events and ideas. Because of changes in information technology as well as the increasing mobility of capital, labor, ideologies, beliefs, consumer preferences, and fads, the environment is permeated by multiple and diverse messages. Nations and peoples long buffered from competing models and alternative logics are now routinely confronted by challenges to their indigenous institutions from ideas carried by multiple carriers including immigrants, the mass media, consultants, and the internet (Appadurai 1996; Sahlin-Andersson and Engwall, 2002; Scott 2003a).

A single organization is now more likely to operate simultaneously in numerous institutional environments, as does the multinational corporation (Westney, 1993; Nohria and Ghoshal 1997). And without leaving home, organizations are bombarded by "foreign" actors, beliefs and practices. Both

allies and foes in Europe were confronted by and strongly encouraged to adopt U.S. business models as they rebuilt their economies after World War II with the assistance of the American Marshall plan (Djelic 1998). Innovators like Demming, unable to gain a hearing in the U.S., traveled to Japan where his ideas were welcomed and adopted, and the resulting success of these models carried them back to the U.S., where organizations were pressured to join the “quality revolution” (Cole and Scott 2000). Organizations increasingly form joint ventures to construct complex projects—dams, underground transit systems, skyscrapers—working in combination with foreign partners on alien soil and becoming thereby subject to multiple, possible conflicting, layers of cultural, regulative, and normative prescriptions (Levitt and Scott 2004). What body of ideas or research is better constituted to confront these types of problems than institutional theory?

However, the utility of the theory is not confined to the organizational level. Important changes are also underway at national, transnational, and global levels, and institutional theory is well positioned to assist scholars in characterizing and explaining these changes. My colleague, John Meyer and his associates, along with others, have productively employed institutional theory to examine the distinctive properties and dynamics of the nation-state (Meyer et al., 1997; Thomas et al., 1987). And increasing attention is now being directed to structures and processes at the transnational and/or global level, as growing numbers of inter-governmental arrangements (treaties, commissions), international non-governmental organizations (INGOs), and international

professional bodies compete for attention and influence in every conceivable arena (Boli and Thomas 1999; Djelic and Quack 2003). Institution-building is proceeding apace at the global level. Since centralized power and authority are still lacking at these supra-national levels, cultural-cognitive and normative modes of influence ---“soft power”—are the weapons of choice. For example, professional groups are likely to promote the development of “standards”—normative guidelines carrying moral but not coercive backing (Brunsson and Jacobsson 2000); and nongovernmental groups are likely to propose cultural-cognitive distinctions combined with moral principles to exert individuals, organizations, and nation-states to exhibit “progress” along a wide range of proposed indicators. In sum, a growing array of institutions will continue to play an influential role in social life and furnish an increasingly rich and challenging environment for individual organization and systems of organizations. And, consequently, institutional theory appears well positioned to help us make sense of and, perhaps, help us to better guide the course of these important developments.

Comments on Personal Contribution

The editors have encouraged each of us to say a few words about what we see as our own distinctive contribution to the development and understanding of the theory under review. Before doing so, I would like to state for the record that institutional theory and, indeed, most compelling theoretical programs of which I have knowledge, are much more accurately portrayed as collective rather

than individual projects. Science is, by its nature, a social activity, advanced by both cooperative and competitive processes. [My favorite definition of science is that of a community of “organized skepticism.”] While individuals have insights, “it takes a village” or, better, an “invisible college” to develop, evaluate, elaborate, and exploit a fledging idea. I have been educated—informed, enlightened, criticized, and corrected—by my “colleagues”, ranging from Max Weber, whose portrait hangs on my office wall, to contemporaries, with whom I interact in seminar rooms and conferences, through their publications, blind reviews and e-mail, to students, who ask innocent, profound questions, raise challenging counter-examples, search out new types of data, and suggest new applications.

As I have tried to make clear, I make no claims to be the originator of institutional theory or, indeed, to count myself among its most innovative progenitors (whether in the 19th or 20th centuries). Rather, I would describe my particular contributions by noting four of the roles or functions I have performed: as connector, codifier, carrier, and contributing researcher.

As *connector*, I have worked to link the broad world of institutional theory with the interests and agenda of organization theorists and analysts. In my earlier work, I emphasized the effects of institutions on the structure and function of organizations; and in later work, I have been attentive to the more active roles that organizations play as incubator, co-producer, interpreter, and carrier of institutional schemas and routines. Within organization studies, I see and have attempted to cultivate connections between institutional theory and such diverse areas as: strategy, entrepreneurship, health care management, human resources,

international management, management history, organizational cognition, organization structure and change, organizations and the natural environment, and public and nonprofit forms. Beyond the field of organizational studies, I have worked to develop and demonstrate the connections between institutional theory and closely related areas of study, such as law and society (Scott 1994), policy analysis (Scott 2002), and social movements (McAdam and Scott, 2004).

In the role of *codifier*, as previously discussed, I have summarized, organized, and distilled the manifold conceptions and arguments of a range of institutional theorists into a more comprehensive framework, in an attempt to foster their comparison, cross-stimulation, and, perhaps eventually, integration. My Pillars framework is not assumed to be the last word, but is intended as a useful step in encouraging scholars to contribute to the cumulative growth of the theoretical program. It also advances the concerns of *connecting* varying brands of institutional theory—transaction cost, evolutionary economics, historical institutionalism, ethnomethodology, organization culture and identity, population ecology, and both traditional- and neo-institutional sociological—so that each is seen as a part of a larger tapestry (Scott and Meyer 1994; Scott 1995; 2001).

As *carrier*, I have been active in communicating institutional conceptions and approaches to a wider audience. I have done this through my research, lectures, teaching, and especially, my textbooks. In terms of texts, I wrote the book *Institutions and Organizations*, (1995, 2001), in an effort to clearly communicate institutional arguments relating to organizations to as wide an audience as possible. I endeavored in this book to trace the unfolding history of

the development of institutional theory and research, but also to point out areas that had been neglected, arenas of controversy, and needed research. In my general organizations text, *Organizations: Rational, Natural and Open Systems*, (Scott 2003b), as new editions have appeared, I have devoted an ever larger portion of to institutional arguments and ideas. Now in its 5th edition, this general survey of theory and scholarship affords me the opportunity to describe how institutional theory's assumptions and arguments complement, compete with, and connect to other theoretical traditions.

As contributing researcher, I have worked to show the relevance of institutional theory as an approach to analyzing a number of diverse sectors and organization fields, beginning with public education in collaborative studies with Meyer and others as previously described, then extending to mental health (Scott and Black 1986), services for the aging (1981), medical care (Alexander and Scott 1984; Ruef and Scott 1998), training programs in firms and agencies (Scott and Meyer 1991; Monahan, Meyer, and Scott 1994), and human resource programs, as we examined the diffusion of equal opportunity and other labor protections in firms and public organizations (Dobbin et al, 1988; Dobbin et al., 1993; Sutton et al, 1994).

In selecting topics for research, I have attempted to be governed more by theoretical criteria than by applied concerns, focusing more attention on the longer-term goal of improving the general explanatory framework (independent variables) and arguments than on the short-term concern of solving specific problems (dependent variables). Hence, in early work with Meyer, we focused

analytic attention on situations in which institutional regimes were conflicting and or ambiguous. I selected sectors or fields for study because they represented differing values on independent variables—for example, being poorly bounded and institutionally underdeveloped (e.g., mental health), or undergoing rapid change and deinstitutionalization processes (e.g., medical care in the U.S. [Scott et al, 2000]). And, in recent studies, I have consciously attempted to bridge and integrate various levels of analysis (Scott, 1993; Scott et al. 2000).

In sum, I have sought and pursued numerous paths in attempting to advance institutional theory. The development of a theoretical research program, like the building of a great cathedral, requires long periods of time, the extensive expenditure of resources, and a highly diverse pool of labor, involving different expertise, skills, and work routines. Each of us must wrestle with two related but different questions: “What is the best thing to do?” and “What do I do best?”

Concluding Comment

As I have tried to suggest, institutional theory has a long past and a promising future. It is not a fly-by-night theory that is here today and gone tomorrow. It is not a boutique theory in which some academic entrepreneur declares his or her theory to explain a disproportionate proportion of the variance in some, specific dependent variable or in some limited domain of social behavior. It is broadly positioned to help us confront important and enduring questions, including the bases of organizational similarity and differentiation, the relation

between structure and behavior, the role of symbols in social life, the relation between ideas and interests, and the tensions between freedom and order.

Of particular importance for the future health of organization studies, institutional theory encourages scholars to take a longer and a broader perspective in crafting testable arguments. An embarrassingly large proportion of our theoretical conceptions and empirical findings has been constructed by U.S. scholars based on data collected from U.S. organizations operating during the past few decades. Institutional theory can do much to overcome this regional, temporal bias as it fosters a rich combination of historical and comparative research, and supports this effort by providing conceptual tools to encompass and interpret the extraordinary variety of organizations over time and space.

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