

# Institutional Complexity and Organizational Responses

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## Abstract

Organizations face institutional complexity whenever they confront incompatible prescriptions from multiple institutional logics. Our interest is in how plural institutional logics, refracted through field-level structures and processes, are experienced within organizations and how organizations respond to such complexity. We draw on a variety of cognate literatures to discuss the field-level structural characteristics and organizational attributes that

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shape institutional complexity. We then explore the repertoire of strategies and structures that organizations deploy to cope with multiple, competing demands. The analytical framework developed herein is presented to guide future scholarship in the systematic analysis of institutional complexity. We conclude by suggesting avenues for future research.

## Introduction

Organizations face institutional complexity whenever they confront incompatible prescriptions from multiple institutional logics. Institutional logics are overarching sets of principles that prescribe “how to interpret organizational reality, what constitutes appropriate behaviour, and how to succeed” (Thornton, 2004: 70; see also Friedland & Alford, 1991). Logics, in other words, provide guidelines on how to interpret and function in social situations. Organizations comply with logics in order to gain endorsement from important referent audiences and because logics provide a means of understanding the social world and thus for acting confidently within it. Typically, organizations face multiple logics that may—or may not—be mutually incompatible (Friedland & Alford, 1991; Kraatz & Block, 2008; Selznick, 1949). To the extent that the prescriptions and proscriptions of different logics *are* incompatible, or at least appear to be so, they inevitably generate challenges and tensions for organizations exposed to them.

Academic science departments in universities, for example, function in a context where the logics of science and of commerce are both in play and yet prescribe different behaviors—such as open publication and the pursuit of knowledge versus the proprietary retention and commercial exploitation of research results. Accounting firms, similarly, are subject to the logic of professional service and, at the same time, the logic of commerce, which again, under certain circumstances might prescribe different actions. Hospitals bring together different professions—physicians, physiotherapists, psychiatrists, social workers, nurses, and so on—each socialized within different cognitive and normative orders. Our interest is in how organizations cope with these tensions—that is, we seek to understand their responses to institutional complexity. How, we ask, do organizations experience and respond to these seemingly incompatible, socially derived, expectations?

Importantly, we will argue that the pattern of institutional complexity experienced by organizations is never completely fixed *and* that the nature of that complexity is fundamentally shaped by processes within organizational fields (Scott, 2008). Emerging fields, for example, are often characterized by sharp contestation between logics as proponents vie to prioritize logics favorable to their material interests or normative beliefs, with the result that the relative salience of particular logics ebbs and flows. Mature fields, in contrast, are more likely to have evolved stable priorities between logics—even if these

“settled” priorities are merely “temporary truces” (Hoffman, 1999) in an ongoing battle for jurisdictional dominance (Abbott, 1988; Dunn & Jones, 2010; Reay & Hinings, 2009; van Gestel & Hillebrand, 2011). Over time, new organizations enter fields, bringing with them new ideas. Shifts in social circumstances can enable subordinated interests to successfully mobilize and install a new logic or reprioritize existing ones (Lok, 2010). Thus, over the longer term, institutional complexity unfolds, unravels and re-forms, creating different circumstances to which organizations must respond.

Not only is institutional complexity in continual flux, but organizations experience it differently and to different degrees. An organization’s position within a field shapes the form and intensity of complexity that it will experience—such that, “central” highly embedded organizations may be more exposed to the tension that multiple logics engender as compared to less embedded “peripheral” organizations. Characteristics of the organization—its structure, ownership, governance, and identity—can make it particularly sensitive to certain logics and less so to others. Some organizations, such as visible and high-status firms, may be especially “targeted” by stakeholders advancing particular logics. Paradoxically, the same organizations, because of their size and resources, may be insulated from institutional pressures in a way that is unavailable to smaller, more resource-strapped organizations.

Given that organizations experience complexity to varying degrees, it follows that they will differ in how they might respond. These responses are important because they can have major implications for social legitimacy and thus an organization’s access to critical resources. Organizational survival may even be at stake. Further, responses to highly incompatible prescriptions or demands will inevitably prioritize some interests at the expense of others. For theoretical purposes, therefore, it matters that we understand the relationship between institutional complexity and organizational responses. It also matters for more practical reasons, because a more informed understanding could help policymakers interpret the forces shaping behaviors in settings as varied as hospitals, schools, and corporations—and thus help them to devise and implement more appropriate regulations.

Despite the importance of organizational responses to institutional complexity, our understanding remains selective. As Pache and Santos (2010: 455—see also, Goodrick & Reay, *in press*) recently observed, “while institutional scholars acknowledge that organizations are often exposed to multiple and sometimes conflicting institutional demands... existing research makes no systematic predictions about the way organizations respond to such conflict.” Our concern in this paper is to address this neglect and seek to understand how the interaction of plural institutional logics, refracted through field-level structures and processes, are experienced within organizations, and how organizations respond.

We begin, in the next section, by reviewing the emergence of the concept of “institutional logic” and recent recognition of the need to better understand

institutional complexity. In the subsequent section, we draw on a variety of cognate literatures to identify and discuss how field-level structural characteristics and mechanisms shape the degree of institutional complexity confronting organizations. We explore various organizational attributes that frame how organizations experience this complexity and how they construct a repertoire of possible responses. The multilevel analytical framework developed herein is intended to provide a more holistic picture of how institutional complexity arises and of how organizations respond. We offer this framework as a suggested guide by which future scholarship might systematically examine how organizations cope with multiple, competing demands. We conclude by suggesting fruitful avenues for future research.

### Starting Points

The complexity of institutional processes and their influence on organizational behavior has been implicit within the institutional perspective since Meyer and Rowan's (1977) observation that organizations confront sociocultural as well as commercial expectations—and that these may be incompatible. Scott (1991: 167) underlined the point: "there is not one but many institutional environments and... some would-be sources of rationalized myths may be in competition if not in conflict." Elsbach and Sutton (1992: 700), similarly, added that the expectations of powerful external actors "are often conflicting, vague, and in flux." D'Aunno, Sutton and Price (1991: 636) echoed that "conforming to strong environmental beliefs and rules is difficult for many organizations... because they face fragmented environments in which multiple independent groups and organizations make demands that are, at best, uncoordinated."

Meyer and Rowan's (1977) insight that sociocultural factors affect organizations triggered an interest in the nature of these processes—especially after DiMaggio and Powell's (1983) analysis of the mechanisms by which sociocultural prescriptions are diffused and distributed, and Tolbert and Zucker's (1983) pioneering account of diffusion processes across municipalities in the United States. Such has been the influence of this line of scholarship that the institutional perspective is now a dominant lens within organization theory (Greenwood, Oliver, Sahlin, & Suddaby, 2008). Surprisingly, however, in the immediate decades following Meyer and Rowan's (1977) insight, interest in how organizations cope with tensions between "institutionalized rules" and "efficiency criteria" became subordinated to other lines of inquiry; only recently have attempts been made to gain a fuller appreciation of the nature and consequences of incompatible pressures upon organizations.

Instead, early explorations sought to establish that sociocultural forces *do* affect how organizations conduct themselves. Often, these efforts showed the diffusion of particular practices throughout a given organizational field (for a review, see Boxenbaum & Jonsson, 2008). Or, they showed how social

norms and prescriptions became “translated” (for a review, see Sahlin & Wedlin, 2008). Taken together, this body of scholarship convincingly demonstrated that institutional processes are at work, but did so without explicitly connecting organizational practices or structures to an overall mode of thinking, although that idea was sometimes implicit. Fligstein (1985), for example, referred to “a totalizing world view of managers or entrepreneurs that causes them to filter the problems of the world in a certain way” (see also Jackall, 1988).

An important turning-point was provided by Friedland and Alford (1991), who shifted the focus of attention towards the idea of “institutional logics,” of which practices and structures are tangible manifestations. Friedland and Alford conceptualized Western society as an “inter-institutional system” comprising “the capitalist market, bureaucratic state, democracy, nuclear family, and Christian religion” (1991: 232), and emphasized that each is associated with a distinctive “institutional logic.” Society, in this sense, is constituted through multiple institutional logics that “are interdependent and yet also contradictory” (1991: 250). We take this to mean two things. First, *multiple* institutional logics are available and can interact and compete for influence in all societal domains (Nigam & Ocasio, 2010). Second, logics are often in conflict—that is, their respective systems of meaning and normative understandings, built into rituals and practices, provide inconsistent expectations.

Over the past two decades, escalating interest in institutional logics has reached the point where the term “has become something of a buzz word” (Thornton & Ocasio, 2008: 99), and it remains one of the fastest-growing areas of scholarship in organizational theory (for reviews, see Thornton & Ocasio, 2008; Thornton, Ocasio & Lounsbury, in press). Our interest centers upon how individual organizations respond to multiple institutional logics, as refracted and manifested at the field level; but it is important to emphasize that research on institutional logics has variously focused on different levels of analysis. Some studies lay more emphasis on the play of institutional logics at the societal level, whereas others focus more upon the field level, even though societal-level logics are at least implicit in field-level studies.

At the societal level, Bhappu (2000: 409) highlighted how the structure of Japanese corporate networks and their management practices “persisted in the face of widespread efforts to emulate Western organizational models,” and demonstrated how the profound respect for the institution of family insulates Japanese organizations from the full pervasiveness of the “market” logic. However, complexities arising from the imposition of two logics on Japanese organizations are only intimated. Other studies have more explicitly analyzed the interplay of societal logics (e.g., Greenwood, Diaz, Li, & Lorenete, 2010; Heimer, 1999; Miller, Le Breton-Miller, & Lester, 2010; Purdy & Gray, 2009; Zhao & Wry, 2011). Miller et al. (2010), for example, investigated the interplay of market and family logics, comparing the strategic behaviors of lone founders

with those of family-owned and -governed firms. The central argument put forward is that norms and prescriptions dictated by family logics are often at odds with prescriptions dictated by markets. Family logics are also at the center of Heimer (1999) and Greenwood et al.'s (2010) studies, although they depict a more complex scenario where multiple inherently contradictory logics coexist and compete.<sup>1</sup> Marquis and Lounsbury (2007) connect fundamental and competing logics of the state to alternative logics in the U.S. banking sector; furthermore, in an interesting elaboration, they show how field-level logics become rooted in geographical communities (see also Lounsbury, 2007).

These societal-level studies are important and have provided significant insights. But while institutional complexity is usually (but not always) implied, recognition is limited to an acknowledgment that organizational actions are influenced by the potentially conflicting interactions between logics. This same general weakness pervades many of the field-level studies of institutional logics, for which the typical motivation has been to understand processes of institutional construction and change (for a review, see Goodrick & Reay, in press; Thornton & Ocasio, 2008). Admittedly, some studies do explicitly embrace the nestedness of field-level logics, and in this way imply vertical complexity (notably, Purdy & Gray, 2009; Thornton, 2002, 2004; Thornton & Ocasio, 1999), but for the most part field-level studies ignore the vertical nestedness of logics in order to give attention to horizontal complexity—i.e., to identifying logics underpinning field-level institutions and to showing how these logics are historically contingent (e.g., D'Aunno et al., 1991; Dunn & Jones, 2010; Lounsbury, 2002; Rao, Monin & Durand, 2003; Reay & Hinings, 2005, 2009; Zajac & Westphal, 2004).

Typically, much of this work portrays fields as ordered by an overarching logic and analyzes the processes by which fields move from one “dominant” logic to another. In essence, these studies underscore a period effect, whereby a “jolt” (Meyer, 1982) ushers in a new dominant logic—effectively separating one relatively stable period of beliefs from another. For the most part, the assumption has been that any contradiction between logics is transitional—with little suggestion of the possibility of ongoing complexity. Recently, however, a number of scholars have begun to highlight the presence of multiple logics coexisting over extended periods of time (e.g., Dunn & Jones, 2010; Jarzabkowski, Matthiesen, & Van de Ven, 2010; Reay & Hinings, 2009; Schneiberg & Clemens, 2006). Even so, these recent treatments and discussions of the coexistence of logics have tended to be framed as competition between *two* logics, rather than, as Goodrick and Reay (in press) put it, between “constellations” of logics. Importantly, these studies show that field-level mechanisms play a key role in the filtering, framing and enforcing of logics—such that any attempt to understand complexity at the organizational level should take into account field-level processes.

It was left to Hoffman (1999: 2001) to stress the long-term multiplicity of logics within fields; and, although his purpose—echoing Friedland and Alford (1991)—was to foreground political struggle and the possibility of institutional change, his recognition of multiple logics inevitably draws attention to how they might relate to one another. Thus, the last decade has seen greater interest in understanding how multiple logics—albeit, still rarely more than two—play out within organizational fields (e.g., Binder, 2007; Delbridge & Edwards, 2008; Dunn & Jones, 2010; Kitchener, 2002; Lok, 2010; Lounsbury, 2007; Marquis & Lounsbury, 2007; Pache & Santos, 2010; Purdy & Gray, 2009; Reay & Hinings, 2009; Scott, Ruef, Mendel, & Caronna, 2000). Moreover, and contrary to the often presented image of fields progressing through “transition times until one side or the other wins and the field reforms around the winning logic” (Reay & Hinings, 2009: 632), it is now more readily accepted that some fields are better portrayed as leaning towards the “relative incoherence” of enduring, competing logics (Schneiberg & Clemens, 2006: 210; for a review, see Kraatz & Block, 2008).

Enduring institutional complexity is, perhaps, particularly likely in contexts such as the health sector (Dunn & Jones, 2010; Goodrick & Reay, in press; Heimer, 1999; Imershein & Rond III, 1989; Jarzabkowski et al., 2010; Reay & Hinings, 2005, 2009; Scott et. al., 2000) and in organizations delivering professional and/or educational services (Thornton, Jones, & Kury, 2005) because of the sheer array of occupations, which tend to be motivated and conditioned by different logics. To wit, hospitals are illustrative sites where vertical as well as horizontal complexity is at play. Heimer’s (1999) study of neonatal intensive care units, for example, shows how law, medicine, and family institutions first become “insinuated” into internal organizational decision-making processes and then interact and compete for jurisdictional authority.

The conceptualization of field-level institutional complexity as an enduring and persistent feature of organizational fields has sparked increased interest in its implications for individual organizations. This work, which is our central interest, has at least two lines of exploration. One line of thought seeks to understand the “strategies” employed by organizations when faced with multiple logics (Oliver, 1991; Pache & Santos, 2010; Kraatz & Block, 2008). Another focuses upon how multiple logics are reflected in organizational “structures” and “practices”—seeking to understand different types of “hybrid” organizations (e.g., Battilana & Dorado, 2010; Dunn & Jones, 2010; Fox-Wolfgramm, Boal, & Hunt, 1998; Greenwood & Hinings, 1996; Jarzabkowski et al., 2010; Pache & Santos, 2011; Smets, Morris, & Greenwood, forthcoming).

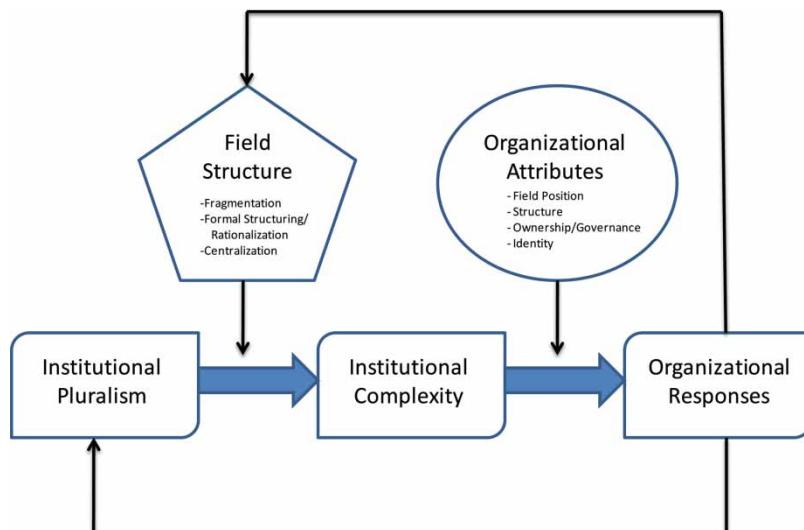
Institutional research, in other words, is at last beginning to probe the pattern of relationships between logics, fields *and* organizations, and is becoming more appreciative of the nuances of those relationships. But progress, though encouraging, has been modest and much remains to be learned. It is

timely, therefore, to suggest how this work might be advanced. To do so, we use the analytical framework summarized in Figure 1, which emphasizes our focal interest in understanding the variegated responses of organizations to the experience of institutional complexity. We begin, in the next section, by more carefully defining what we intend by the term institutional complexity. Then, we move on to analyze how complexity is shaped and processed by field-level mechanisms. This is followed by a summary of organizational “filters” that suggest how and why organizations might respond differently to field-level institutional pressures. Finally, we elaborate a framework of organizational responses.

### Institutional Complexity

Table 1 summarizes *empirical* studies that discuss institutional complexity, irrespective of whether they refer explicitly to “logics.” It shows the range of empirical settings (albeit mostly in the U.S.), time frames, and levels of analysis from which ideas and insights have been tested and generated. It also shows a predominance of longitudinal research designs, and a relative balance between qualitative and quantitative methodological approaches—with a few studies combining the two. Importantly, the table reveals two restrictive assumptions in how complexity has been approached—namely, the relatively narrow range of logics, and the assumption of their incompatibility.

The majority of studies consider only two logics. This restricted scope has important implications. First, any findings or conclusions drawn from the



**Figure 1** Institutional Complexity and Organizational Responses.

**Table 1** Summary of Selected Papers on Institutional Logics and Institutional Complexity\*

Author(s), publication year	Level of analysis, time frame, empirical setting	Method(s)	Key findings
Battilana & Dorado, 2010	<ul style="list-style-type: none"> <li>• Organization</li> <li>• 1997, 1998, 2000</li> <li>• Microfinance sector in Bolivia</li> </ul>	Comparative case study	The combination of two contradictory logics in hybrid organizations is highlighted. Conditions under which organizations maintain their hybridity are discussed.
Binder, 2007	<ul style="list-style-type: none"> <li>• Organization</li> <li>• 2003–2005</li> <li>• Social service sector in U.S.</li> </ul>	Ethnographic case study	Organizational units within the same organization respond in variegated ways to pressures imposed by institutional logics.
Chung & Luo, 2008	<ul style="list-style-type: none"> <li>• Business group</li> <li>• 1986–1988</li> <li>• Business sector in Taiwan</li> </ul>	Quantitative analysis	The primacy of institutional logics over agency costs as mechanisms for shaping corporate restructuring is highlighted.
Cooper, Hinings, Greenwood, & Brown, 1996	<ul style="list-style-type: none"> <li>• Organization</li> <li>• 1990–1994</li> <li>• Law firms in Canada</li> </ul>	Comparative case study	The shift from a professional to a market interpretive scheme leads to the emergence of an alternative organizational archetype.
D'Aunno, Succi, & Alexander, 2000	<ul style="list-style-type: none"> <li>• Population</li> <li>• 1984–1991</li> <li>• Health care in U.S.</li> </ul>	Quantitative analysis	Strong local market forces and heterogeneous institutional forces lead to the abandonment of institutionalized templates.
D'Aunno, Sutton, & Price, 1991	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1984</li> <li>• Health care in U.S.</li> </ul>	Quantitative analysis	The transformation from consistent to conflicting environmental demands drives the adoption of apparently conflicting practices.

**Table 1** Summary of Selected Papers on Institutional Logics and Institutional Complexity\* (Continued)

Author(s), publication year	Level of analysis, time frame, empirical setting	Method(s)	Key findings
Djelic & Ainamo, 2005	<ul style="list-style-type: none"> <li>• Field</li> <li>• 19th century–2004</li> <li>• Global mobile telephony</li> </ul>	Historical narrative and comparative case studies	The process of transposing logics across fields is investigated. Dynamics of hybridization and logic co-habitation are highlighted.
Dunn & Jones, 2010	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1910–2005</li> <li>• Medical education in U.S.</li> </ul>	Historical narrative and quantitative analysis	Plural logics are supported by distinct groups and interests; logics fluctuate over time and create dynamic tensions.
Edwards & Delbridge, 2011	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1960s–present</li> <li>• Superyacht industry</li> </ul>	Historical case study	The contradiction and interdependence of professional and market logics is highlighted. Logics occur in opposition, but also co-exist with varying degrees of (in)compatibility.
Glynn & Lounsbury, 2005	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1995–1998</li> <li>• Atlanta symphony orchestra</li> </ul>	Quantitative content analysis	The shift in institutional logics shapes the discourse of critics and their judgment of performances.
Goodrick & Reay, in press	<ul style="list-style-type: none"> <li>• Professional group</li> <li>• 1852–present</li> <li>• Pharmacists in U.S.</li> </ul>	Historical case study	A conceptualization of professionals as guided by a constellation of logics is proposed to explain change in professional work.
Green, Babb, & Alpaslan, 2008	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1978–1998</li> <li>• Standard &amp; Poor's 1500 in U.S.</li> </ul>	Case study	Corporate control rhetoric shapes the competition of institutional logics and establishes a dominant stakeholder group in the field.

Greenwood, Diaz, Li, & Lorente, 2010	<ul style="list-style-type: none"> <li>• Industry</li> <li>• 1994–2000</li> <li>• Manufacturing sector in Spain</li> </ul>	Historical narrative and quantitative analysis	Regional state logics and family logics impact how organizations respond to overarching market logics. The role of religion is implicated.
Heimer, 1999	<ul style="list-style-type: none"> <li>• Organization</li> <li>• 1980s–1990s</li> <li>• Health care in U.S.</li> </ul>	Ethnographic case study	The competition between legal, medical, and familial institutions impacts decision-making processes in organizations.
Hoffman, 1999	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1960–1993</li> <li>• Chemical industry in U.S.</li> </ul>	Quantitative content analysis	The co-evolution of organizational fields and institutions is theorized. The long-term multiplicity of institutional logics is highlighted.
Kitchener, 2002	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1999–2000</li> <li>• Health care in U.S.</li> </ul>	Case study	The shift from professional to market logic changes the basis of legitimacy and causes the failure of mergers between organizations.
Lok, 2010	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1984–2004</li> <li>• Corporations in UK</li> </ul>	Historical case study and discourse analysis	The role of identity construction in institutionalization processes. Identity work that paradoxically accommodates and resists the practice and identity implications of new institutional logics.
Lounsbury, 2002	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1945–1993</li> <li>• Financial sector in U.S.</li> </ul>	Historical qualitative and quantitative analysis	The shift from regulatory logic to market logic enables status mobility projects of professional groups.

**Table 1** Summary of Selected Papers on Institutional Logics and Institutional Complexity\* (Continued)

<b>Author(s), publication year</b>	<b>Level of analysis, time frame, empirical setting</b>	<b>Method(s)</b>	<b>Key findings</b>
Lounsbury, 2007	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1944–1985</li> <li>• Financial sector in U.S.</li> </ul>	Quantitative analysis	The spread of a new practice is shaped by competing logics that generate variation in organizational behavior and practice adoption.
Luo, 2007	<ul style="list-style-type: none"> <li>• Individual</li> <li>• 1995</li> <li>• Citizens in Germany, Luxembourg, UK</li> </ul>	Quantitative analysis	National institutional logics shape individuals' attitudes and preferences toward continuous learning model of employee training.
Marquis & Lounsbury, 2007	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1994–2002</li> <li>• Banking sector in U.S.</li> </ul>	Quantitative analysis	Competing logics facilitate resistance to institutional change by stimulating new forms of professional entrepreneurship.
Meyer & Hammerschmid, 2006	<ul style="list-style-type: none"> <li>• Individual</li> <li>• 2003</li> <li>• Public sector in Austria</li> </ul>	Quantitative analysis	The shift from legalistic-bureaucratic logic to managerial logic is reflected in the vocabulary individuals use to claim their social identities.
Meyer & Hollerer, 2010	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1991–2000</li> <li>• Corporations in Austria</li> </ul>	Qualitative content analysis and quantitative analysis	Variations in the meanings assigned to shareholder value are anchored in institutional logics.
Miller, Le-Breton-Miller, & Lester, 2010	<ul style="list-style-type: none"> <li>• Organization</li> <li>• 1996–2000</li> <li>• Fortune 1000 in U.S.</li> </ul>	Quantitative analysis	Variations in role identities and logics explain differences in family managers and lone founders' strategic behaviors.

Nigam & Ocasio, 2010	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1991–1995</li> <li>• Health care in U.S.</li> </ul>	Case study and quantitative content analysis	The interplay between attention and environmental sensemaking leads to the emergence and adoption of field-level logics.
Pache & Santos, 2011	<ul style="list-style-type: none"> <li>• Organization</li> <li>• 2007–2008</li> <li>• Social sector in France</li> </ul>	Comparative case study	Organizations respond to competing logics by adopting a combination of intact practices from those logics.
Purdy & Gray, 2009	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1982–2004</li> <li>• Alternative dispute resolution in U.S.</li> </ul>	Case study and qualitative content analysis	The mechanisms through which competing logics diffuse, as well as the conditions supporting the persistence of multiple logics within a field, are investigated.
Rao, Monin, & Durand, 2003	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1970–1997</li> <li>• Elite cuisine in France</li> </ul>	Historical narrative and quantitative analysis	Identity movements lead to the transformation of logics and role identities.
Reay & Hinings, 2005	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1988–1998</li> <li>• Health care in Canada</li> </ul>	Case study	The shift from professional to market logic yields radical change. Persistence of the previous dominant logic is highlighted.
Reay & Hinings, 2009	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1994–2008</li> <li>• Health care in Canada</li> </ul>	Case study	The persistence of a multiplicity of logics is highlighted. Its management through collaboration between field actors is investigated.
Scott, Ruef, Mendel, & Caronna, 2000	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1945–1999</li> <li>• Health care in U.S.</li> </ul>	Comparative historical case studies and quantitative analysis	The shift from professional to market logic contributes to the dramatic modification of the healthcare system.

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<b>Author(s), publication year</b>	<b>Level of analysis, time frame, empirical setting</b>	<b>Method(s)</b>	<b>Key findings</b>
Shipilov, Greve, & Rowley, 2010	<ul style="list-style-type: none"> <li>• Organization</li> <li>• 1999–2005</li> <li>• Public companies in Canada</li> </ul>	Quantitative analysis	The diffusion of institutions and their underlying logics in multiple waves is investigated in the context of governance practices.
Thornton, 2002	<ul style="list-style-type: none"> <li>• Industry</li> <li>• 1958–1990</li> <li>• Higher-education publishing in U.S.</li> </ul>	Quantitative analysis	The shift from editorial to market logic has a moderating effect on the adoption of the M-form organizational structure.
Thornton, 2004	<ul style="list-style-type: none"> <li>• Industry</li> <li>• 1958–1990</li> <li>• Higher-education publishing in U.S.</li> </ul>	Historical narrative and quantitative analysis	Societal-level institutional logics shape attention structures and decision-making processes within organizations.
Thornton, Jones, & Kury, 2005	<ul style="list-style-type: none"> <li>• Industry</li> <li>• 1950s–1990s</li> <li>• Accounting, architecture, and higher-education publishing in U.S.</li> </ul>	Historical comparative analysis	The shifts in institutional logics influence patterns of institutional stability and change in organizational governance.
Thornton & Ocasio, 1999	<ul style="list-style-type: none"> <li>• Industry</li> <li>• 1958–1990</li> <li>• Higher-education publishing in U.S.</li> </ul>	Historical narrative and quantitative analysis	The shift from editorial to market logic changes the positional, relational and economic determinants of executive succession.

Townley, 2002	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1994–2000</li> <li>• A division of the provincial government of Alberta, Canada.</li> </ul>	Case study	Responses to competing and inconsistent logics brought about by a clash of value spheres between the cultural and the economic are illustrated.
Tracey, Phillips, & Jarvis, 2011	<ul style="list-style-type: none"> <li>• Organization</li> <li>• 2001–2004</li> <li>• Social sector in UK</li> </ul>	Case study	The combination of contradictory logics creates a new organizational form. The hybrid logic persists in the field despite the failure of the entrepreneurial project.
van Gestel & Hillebrand, 2011	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1987–2003</li> <li>• Public employment services in the Netherlands</li> </ul>	Case study	Multiple institutional logics remain in play after a dominant logic is settled. The process of temporary stability and change is explored.
Zajac & Westphal, 2004	<ul style="list-style-type: none"> <li>• Field</li> <li>• 1980–1994</li> <li>• Financial sector in U.S.</li> </ul>	Quantitative analysis	The shift from corporate to agency logic impacts the perceived value of practices and alters the reactions of financial markets.

\* Table 1 summarizes *empirical* studies that discuss institutional complexity, irrespective of whether they refer explicitly to “logics.”

examination of organizational responses may not be generalizable because the extent of complexity experienced may be underestimated or misinterpreted; *and*, the particular responses observed may not be properly understood. For example, logics may reinforce each other, as noted by Greenwood et al. (2010), who showed how the Catholic Church in Spain amplified the institutional logics of family and community—which, together, tempered the logic of the market. In such situations, the relative “weight” of institutional prescriptions would be inappropriately gauged if attention is given only to the *apparent* incompatibility between market and family logics, without paying heed to the interaction and potential reinforcement derived from other logics that are in play. Similarly, when attention is restricted to two logics the issue of how larger numbers of logics might severely complicate the adoption of appropriate organizational structures—as shown by Goodrick and Reay (in press)—is simply missed.

Future research, in other words, should appreciate that a multiplicity of logics are in play in any particular context and be more explicit about the justification of which logics are incorporated into the analysis. There is an especial need for fuller examination of settings in which more than two competing logics are to be found.

The sheer number of logics, however, is only one aspect of institutional complexity. A second is the relative incompatibility between logics. Yet, as Table 1 shows, relatively few studies examine the *degree* to which logics are incompatible. Instead, the implicit assumption—reflected in terms such as “contested,” “conflicting,” and “competing”—is that logics are inherently incompatible. In some instances, differences between logics are usefully and fully described in terms of their contrasting implications for roles, skills and competences, practices, protocols, performance criteria, and so forth (e.g., D’Aunno et al., 1991; Edwards & Delbridge, 2011; Reay & Hinings, 2005; Thornton, 2002, 2004). Nevertheless, logics are typically portrayed as incompatible nominal categories, such as haute versus nouvelle cuisine (Rao et al., 2003) or editorial versus market (Thornton, 2002). Moreover, implicit within most studies examining logic *shifts* is the notion that the ascendance of a new logic results in the dismantling of the previously dominant logic because of their fundamental incompatibility (e.g. Thornton & Ocasio, 1999; Rao et al., 2003).

Conversely, some studies show how logics can be combined and reconfigured to create hybrid organizational forms (e.g., Binder, 2007; Pache & Santos, 2010; Tracey, Phillips, & Jarvis, 2011), hybrid logics (Binder, 2007; Glynn & Lounsbury, 2005), hybrid practices (Goodrick & Reay, in press), or hybrid identities (Lok, 2010; Meyer & Hammerschmid, 2006; see also Albert & Whetten, 1985). In some contexts, in other words, conflicting logics are *relatively* compatible, or can be tailored to be so. Given this inconsistency in extant research, a more explicit definition of “incompatibility” appears warranted. To

date, two approaches have been put forward. Pache and Santos (2010) suggest that incompatibility can be approached by looking at whether the differences concern goals or means. In contrast, Goodrick and Salancik (1996) focus upon the *specificity* of logics.

Pache and Santos (2010) note that conflicting institutional demands may differ with regard to either the ideological *goals* they deem legitimate, or to the *means* or courses of action they prescribe. The authors propose that conflicts or disagreements over goals are particularly challenging, since their resolution requires “organizational members to overtly recognize the incompatibility of the demands on goals, which may, in turn, jeopardize institutional support” (Pache & Santos, 2010: 466). Purdy and Gray (2009), for example, found that the tension arising from disagreements over the mission of alternative dispute resolution offices in the U.S. was particularly problematic. Alleviating this tension proved to be highly challenging, since the local state context where dispute resolution offices were located was dominated by disparate logics, and thus prescribed different goals. These explicit differences in the prescribed goals of two or more logics, in other words, were indicative of institutional complexity. Alternatively, Dunn and Jones’ (2010) study of medical education in the U.S. provides an illustrative example of the challenges arising from the incompatibility over means. They found that internal dialectical tensions over the means by which “quality care” is accomplished underpin the medical profession. In this regard, Dunn and Jones (2010) demonstrate how disagreements over means resulted in jurisdictional competition and contestation between distinct groups and interests. Given these insights, it follows that research into institutional complexity has to be more explicit about both the degree *and* the sources of incompatibility.

Goodrick and Salancik’s (1996) emphasis upon specificity is important because it raises the issue of organizational discretion. Discretion, they suggest, is dependent upon the ambiguity inherent in the goals and practices prescribed—the greater the ambiguity, the greater the scope for discretionary action. For example, in their examination of hospitals with different ownership and teaching structures, Goodrick and Salancik (1996: 4) found that when “institutions concern goals and their pursuit, while the means to the goals are unspecified,” organizational interests play a more influential role in the selection of conformance strategies (see also, Weaver, Trevino, & Cochran, 1999). This idea that the degree of specificity is linked to the scope of organizational discretion is underlined by Thornton and Ocasio (2008: 106), who state that because norms entail a degree of ambivalence about universalistic principles, a “probabilistic, rather than a deterministic view of adherence to dominant norms of behaviour” is more appropriate. In such situations, the degree of incompatibility between logics is tempered and, importantly, the discretionary ability of organizations to reconcile competing logics—whether substantively or symbolically—is significantly enhanced. When the specificity of institutional

prescriptions is high, in contrast, organizational behavior and choice is much more constrained. Universities seeking accreditation from the Association to Advance Collegiate Schools of Business (AACSB), for example, have limited latitude in how they choose to conform to the laid-down standards and criteria (Quinn Trank & Washington, 2009).

These arguments suggest, on the one hand, that when logics are ambiguous and lack specificity, organizations are provided with relatively more discretion in their efforts to alleviate the tensions of complexity. That is, the organization's ability to symbolically or substantively comply with external expectations by carefully framing or blending structures and practices is enhanced. On the other hand, when conflicting logics are highly specific, organizations face a more problematic level of complexity. Specificity constrains managerial discretion by making it extremely difficult to "mask or distract attention from controversial core activities that may be unacceptable to some key constituencies" (Elsbach & Sutton, 1992: 700).

In sum, prior research on institutional logics has implicitly touched upon two facets of institutional complexity: the number of logics *and* the degree of incompatibility between them. The former implies that complexity is importantly determined by the sheer number of logics at play—the higher the number of logics, the greater will be the complexity facing an organization. The latter implies that complexity is amplified by the divergence between prescribed goals and means, and by their relative specificity. While studies have highlighted the presence of multiple institutional logics, we suggest that future research should delve deeper into the dynamic patterns of complexity that confront organizations, arising from the multiplicity of logics to which organizations must respond, and the degree of incompatibility between those logics.

### Field-level Structure

The nature and extent of institutional complexity facing organizations is fundamentally shaped by the structure of the organizational fields within which they are located. It is at this level that overarching sets of meaning and normative criteria become encoded in "local" logics that are manifested in rituals, practices and day-to-day behavior (Dacin, Munir, & Tracey, 2010). It is also at this level that referent audiences, such as accreditation agencies and professional associations, are especially active. Not surprisingly, "no concept is more vitally connected to the agenda of institutional processes and organizations than that of the field" (Scott, 2008: 181). Indeed, for Wooten and Hoffman (2008: 130) it is "the central construct" of institutional analysis. But fields are not all the same. Perhaps surprisingly, therefore, relatively little attention has been given to comparing fields or to developing frameworks by which to do so (for an exception, see Thornton et al., 2005).

Though we lack a fully developed framework for comparing fields, there are two implicit approaches that provide guidance on how it might be done. The first, and more recently emphasized, contrasts “emerging” and “mature” fields (e.g., Anand & Peterson, 2000; Child, Lu, & Tsai, 2007; DiMaggio, 1991; Lawrence, Hardy, & Phillips, 2002; Maguire, Hardy, & Lawrence, 2004; Phillips, Lawrence, & Hardy, 2000; Purdy & Gray, 2009; for a review, see Wooten & Hoffman, 2008). The critical differences often drawn are the presence in mature fields of regularized inter-organizational relationships—i.e. identifiable patterns of interaction among organizations in the field—combined with an articulated institutional infrastructure.

Various aspects of field-level institutional infrastructures have been explored. Some researchers have examined the roles of “collective actors,” such as professional associations (e.g., Greenwood, Suddaby, & Hinings, 2002; Lounsbury, 2002; Purdy & Gray, 2009; Washington, 2004), “social-control agents,” such as international, national and local governments (Greve, Palmer, & Pozner, 2010), “tournament rituals,” such as award ceremonies (Anand & Watson, 2004; Rao, 1994), and “infomediaries,” such as the media and consultants (Deephouse & Heugens, 2009; King, 2008; Hoffman & Ocasio, 2001). Other scholars have looked at the processes that develop and characterize mature fields, including “theorization” processes—whereby arrangements are justified and given scope (Greenwood et al., 2002; Maguire et al., 2004; Strang & Meyer, 1994), mechanisms of enforcement, such as the loss of accreditation and/or withdrawal of legitimacy (Quinn Trank & Washington, 2009; Zuckerman, 1999), and increasing state regulation (e.g., Dobbin & Dowd, 1997).

Few of the above studies fully tease out the implications of field maturity and stability for institutional complexity. But it is implicit that, so far as mature fields are more settled, institutional complexity at the organizational level will be lower because tensions between competing logics have been worked out at the field level. In such situations, institutional demands tend to be more predictable, certainly as compared to emerging fields (Déjean, Gond, & Leca, 2004; Garud, Jain, & Kumaraswamy, 2002; Lawrence & Phillips, 2004). Further, in so far as the implications of logics have been clarified and built into regularized practices, and their reproduction underpinned by a developed institutional infrastructure, the availability of organizational discretion is also lowered.

The idea of mature fields as more settled and stable partly stems from the assumption that such fields have a single, “dominant” logic. However, even mature fields comprised of multiple logics can be stable so long as the relationship between the logics is well understood and predictable. In the Alberta healthcare field, for example, Reay and Hinings (2009) found that while physicians and government did not agree on how the health system should be organized, they adopted mechanisms to manage that rivalry and the divergent

logics continued to coexist over an extended period of time. Similarly, Lounsbury (2007) found that relative stability in the mutual fund industry was achieved by a geographic dispersion of competing logics—whereby the professional trustee logic persisted in one geographic location and the market performance logic in another. This suggests that, given a relatively *predictable* and consistent set of competing institutional demands, organizations should be better able to respond to institutional complexity by developing appropriate internal structures and practices. The predictability of complexity, in other words, can be expected to enable organizations to learn how to manage and respond, mitigating the challenges of institutional complexity. Unpredictability, in contrast, undermines such options.

Studies examining emergent fields, by contrast, underscore the uncertainty inherent in institutional arrangements—such that constitutive institutional rules defining legitimate activities, membership, and boundaries remain ambiguous, permeable, or are not widely understood (e.g., Fligstein & McAdam, 2011; Garud et al., 2002; Navis & Glynn, 2010; Purdy & Gray, 2009). The implication of ambiguity of this kind for institutional complexity is not clear. But, Maguire and colleagues' (2004) work on the emerging field of HIV/AIDS treatment advocacy sheds some light on this issue. Maguire et al. (2004: 674) point out that where “widely shared norms do not yet exist,” institutional entrepreneurs have “relatively unconstrained spaces in which to work” (see also Battilana, Leca, & Boxenbaum, 2009; Khan, Munir, & Willmott, 2007). In such situations, organizations may experience a relatively *low* degree of institutional complexity, given the ambiguity and lack of specification of institutional prescriptions.

On the other hand, emerging fields typically have unsettled or highly permeable boundaries that allow actors from outside to enter with relative ease, bringing with them practices rooted in logics from other fields (Maguire et al., 2004), thus complicating the balance of interests within a field and the relative hierarchy of logics. The structure of the field, therefore, could be unpredictably fragmented, such that organizations would face a *high* degree of institutional complexity because of the lack of consistent and predictable institutional demands. Given these contradictory propositions, we clearly need to know more about the experience of complexity in fields characterized by different stages of development.

An implicit assumption of the distinction between emerging and mature fields is that mature fields are more or less alike—or, at least, that any differences between them are less significant than those between emerging and mature settings. An alternative approach identifies dimensions that allow the researcher to distinguish *between* mature fields. To us, this approach—more prominent in the early years of institutional research (e.g., Meyer & Scott, 1983; Meyer, Scott, & Strang, 1987)—offers the possibility of a more nuanced analysis of the relationship between field-level structures and

institutional complexity. In this approach, fields are compared according to their degree of “fragmentation,” “formal structuring/rationalization,” and “centralization/unification”—dimensions that affect not only the number but also the nature of institutional demands imposed upon organizations.<sup>2</sup>

Fragmentation refers to the number of uncoordinated constituents upon which an organization is dependent for legitimacy or material resources. By implication, a highly fragmented field is one in which several institutional logics are separately represented by uncoordinated organizations or referent audiences. Meyer, Scott, and Strang (1987; see also Meyer & Scott, 1983), for example, contend that the multiple functions and meanings attributed to education give rise to complex and active environmental pressures placed on school systems—with competing demands arising from teachers, local communities, parents, churches, and so forth. Pache and Santos (2010), similarly, propose that fragmented fields are characterized by the coexistence of uncoordinated actors, each favoring disparate sets of institutional prescriptions. It is assumed that fragmentation alone will increase the complexity confronting an organization.

While field-level fragmentation reflects the range of demands pressing upon an organization, formal structuring refers to whether those demands are formally or informally organized. The extent of formalization matters, according to Meyer et al. (1987), because the level of complexity confronting an organization is affected by the extent to which the organization is surrounded “by *formally* organized interests, sovereigns, and constituency groups, as opposed to environments made up of less formally organized groups, communities, or associations” (Meyer et al., 1987: 188, emphasis added). In fact, it is difficult to predict whether greater formalization will result in higher institutional complexity. One possibility is that low formalization increases the discretion available to an organization because informally organized pressures may lack the intensity of those arising from more formalized, coordinated constituent groups. Alternatively, greater formalization may sharpen the specificity of demands and enable an organization to respond in a more calculable manner. Formal organization might also make pressures more visible and easier to police. The empirical link between field-level formalization and the organizational experience of complexity is thus unknown.

The third field-level dimension, the extent of centralization, concerns the hierarchical power structure of institutional constituents. Meyer et al. (1987) illustrate centralization in the field of education, noting the historical trend towards the gathering of previously independent schools into districts—or at an even higher “node of authority,” their placing under the aegis of state governments. The consequence of centralization is the standardization of organizational forms and a reduction of the complexity to which they are exposed: “The environment becomes more centralized but also more unified. The organizational rules... become more clear, better specified, more uniform

and integrated than before" (Meyer et al., 1987: 190). Greenwood et al.'s (2010) account of the highly centralized and coercively enforced regime in Franco's Spain depicts an extreme case of a clear hierarchy amongst institutional referents. Organizations in such contexts, runs the argument, face little institutional complexity because competing demands are worked out at a higher level, either by negotiation between field-level actors and/or by dominant actors enforcing compliance. In contrast, the lack of a centralized actor exposes organizations to competing yet authoritative institutional demands—such that institutional complexity increases in the absence of unifying (centralized) field-level arrangements. These insights show that while field fragmentation exacerbates institutional complexity, field centralization mitigates how that complexity is experienced by organizations.

Pache and Santos (2010) provide an interesting exposition of the *joint* importance of field-level fragmentation and centralization. They argue that institutional complexity is most acute in fields that are moderately centralized, i.e. those "characterized by the competing influence of multiple and misaligned players whose influence is not dominant yet is potent enough to be imposed on organizations" (2010: 458). There are, in fact, two important ideas in this definition. First, there are multiple actors with an unresolved status ordering—i.e. there is fragmentation but only moderate centralization. Second, each proponent of a particular logic has at least some capacity for imposing its demands upon an organization. For Pache and Santos, it is the *combination* of high fragmentation and moderate centralization that generates the highest level of complexity.

This is an important line of theorizing and should attract further empirical work. One concern with Pache and Santos' framework, however, is that the field is portrayed as more or less centralized. Yet, as Meyer and Scott (1983) pointed out, a field might have multiple nodes of centralized authority. Business schools, for example, "are living in something of an audit culture" (Walsh, 2011: 217) and face pressures from several highly organized institutional constituencies, including governments (who supply financial resources), the business community (who supply legitimacy, sponsorship and who hire graduates), professional associations (including the Academy!), and ranking and accreditation agencies (who provide varying degrees of endorsement). *Each* of these referent audiences may or may not be highly organized and centralized in its own sphere. Fields, in other words, can contain multiple points of centralization—in Meyer and Scott's (1983) terms, there can be "fragmented centralization."

A further concern with the Pache and Santos framework is that it does not address the fact that the different nodes of authority may deploy different enforcement mechanisms—ranging from the coercive powers of governments (as in the Spanish example referred to above—Greenwood et al., 2010) to the more normative authority of professional associations and accreditation

agencies (as in Dunn & Jones, 2010). We have little understanding of how the form of enforcement might affect the discretion of organizational responses. Do some enforcement mechanisms allow discretion or the ability to selectively balance logics? Are some enforcement mechanisms more dominant, and under what circumstances? Finally, field-level structures are not necessarily stable: status rankings can shift, altering the salience of competing institutional demands and multiple logics often remain in play even after a dominant logic temporarily arises (Sonpar, Handelman, & Dastmalchian, 2009; van Gestel & Hillebrand, 2011).

To properly compare fields, therefore, it would be useful to provide more substantive and dynamic accounts of their institutional infrastructures, much as Scott et al. (2000) historically provide for one field. We need to develop more analytically elaborated frameworks if we are to systematically *compare* fields with a view to understanding how differences between them affect the organizational experience of complexity (Battilana et al., 2009). We need to know the structural conditions—the pattern of the regularized relationships, and the nature of the institutional infrastructure—that enable fields to simplify or exacerbate complexity, and that shape or constrain how organizations might respond.

### Organizational Filters

Pressures arising from institutional complexity do not affect all organizations equally. Institutional logics pass through organizational fields and are then filtered by various attributes of the organization itself—in particular, the organization’s *position* within a field, its *structure, ownership and governance*, and its *identity*. These attributes frame how organizations experience institutional complexity and how they perceive and construct the repertoire of responses available to them. For the most part, empirical work on these processes is scattered and largely suggestive but, as we show below, interesting clues indicate their undoubtedly importance.

#### *Field Position*

The relevance of an organization’s structural position within an organization field (for a review, see Battilana et al., 2009) was originally identified by Leblebici, Salancik, Copay, and King (1991), who noted that organizations located at the “periphery” are more motivated to deviate from established practices because they are less caught by institutionalized relationships and expectations. This distinction between “center” and “periphery” finds echoes in Abbott’s (1988) analysis of how dominant professions assert themselves over subordinate, less powerful professions, resulting in what DiMaggio (1983) refers to as a “dominance hierarchy.” It is also associated with studies that contrast

“emerging” and “mature” fields. The latter, typically, have well-established hierarchies with central firms distinguished by their visibility, status, resources, usually their size, and the media attention that they receive (e.g., Malerba & Orsenigo, 1996; Philips & Zuckerman, 2001; Podolny, 1993; Stuart, 1988).

To date, research on structural position has not addressed its implications for institutional complexity, but for several reasons organizations at the periphery of a field are less likely to experience the same intensity of institutional complexity and thus their responses might differ fundamentally from those of centrally located organizations. Peripheral organizations may experience lower levels of complexity because they are less connected to other organizations from whom appropriate behaviors are learned and conveyed; as a result, peripheral organizations may be less aware of institutional expectations (Davis, 1991; Galaskiewicz & Wasserman, 1989; Greve, 1998; Kraatz, 1998; Westphal, Gulati, & Shortell, 1997) and be less likely to receive the social nudging and policing that reaffirms existing practices (Westphal & Zajac, 2001; Zuckerman, 1999). Leblebici et al. (1991), for example, found that radical new practices in the U.S. radio broadcasting industry were most likely to be introduced by parties in the fringes of an inter-organizational field—for whom experimentation was less costly and who were less likely to be sanctioned by more central players.

Peripheral organizations are also often disadvantaged by existing arrangements and have less reason to uphold them (Ingram, 1998; Kraatz & Zajac, 1996; Leblebici et al., 1991). D'Aunno, Succi and Alexander (2000), for example, note that organizations are more likely to abandon an institutionalized template when facing adverse situations, such as resource scarcity and unfavorable regulatory regimes. For these reasons, peripheral positions tend to provide greater scope for discretion and flexibility in responding to complexity. In contrast, centrally positioned organizations tend to be deeply embedded in the existing institutional arrangements and therefore may be insensitive to newly emerging complexity. Moreover, to the extent that complexity threatens the advantageous position of central organizations, they will be increasingly resistant to it.

Two characteristics implied in the definition of a “central” organization—its size (often associated with age) and its status—suggest competing hypotheses of the discretion available to central organizations. An organization’s size and status could, conceivably, intensify institutional demands because they provide visibility and thus attract varying levels of media attention. Several studies illustrate this effect (Den Hond & De Bakker, 2007; Greening & Gray, 1994; King, 2008; King & Soule, 2007; Rehbein, Waddock & Graves, 2004; Rowley & Moldoveanu, 2003). For example, Ahmadjian and Robinson (2001) observed that large firms were the most reluctant to abandon the traditional Japanese practice of providing lifelong employment because they were perceived by the media (and by themselves) as embodying traditional

Japanese values. They were, in other words, “visible exemplars” (Wry, Lounsbury & Greenwood, 2011). An alternative interpretation is that large, high-status organizations are able to deviate from prevailing cultural expectations because they are beyond the control of regulatory agents (Greenwood & Suddaby, 2006; Kostova, Roth, & Dacin, 2008). Size, in this sense, provides an organization with a measure of *immunity* from institutional pressures, providing it with greater discretion over how, if at all, to respond to them.

The distinction between central and peripheral positions within an organizational field is well established and has attracted considerable empirical work. Rather less attention has been given to a more recently identified structural position: organizations located at the interstices of multiple institutional logics. Seo and Creed (2002), building upon Friedland and Alford (1991), suggest that organizations in these locations experience institutional contradictions in such a way that reflexivity is probable—i.e. they have an enhanced ability to see and reflect upon highly institutionalized and competing meaning systems. For our purposes, the implication is that the intensity of institutional complexity will be especially acute for organizations in these locations—that is, the demands of different logics and their implied punishments for nonconformity will be experienced more vividly, heightening the tensions of complexity (e.g. see Dunn & Jones, 2010). On the other hand, it could be argued that reflexivity may *remove* an organization from the imperative force of logics—“seeing” the contradiction between institutional prescriptions, paradoxically, may liberate an organization.

A related structural field position focuses on organizations that operate across fields (Levy & Scully, 2007; Morgan & Quack, 2005; Smets et al., 2011). Greenwood and Suddaby (2006: 38) suggest that “a network position that *bridges* fields lessens institutional embeddedness by exposing actors to inter-institutional incompatibilities, increasing their *awareness* of alternatives.” In their study of the Big Five accounting firms, they found that these elite organizations were more likely to come into contact with contradictory logics because their market activities traversed a number of organizational fields. Similarly, Morrill (2006) showed how practitioners involved in alternative dispute resolution operate under extreme complexity because they exist at the interface of the court system, community organizations, *and* the fields of social work and mental health. This argument suggests that boundary bridging positions will likely expose organizations to a higher degree of complexity. At the same time, however, exposure to multiple inter-institutional inconsistencies increases awareness of alternative possibilities, thereby widening the available repertoires of responses.

Our discussion underscores the importance of considering field position as a relevant filter for the complexity confronting organizations. Central and peripheral organizations may vary in the extent to which they experience complexity and in the breadth of responses available to them. Organizations

located at the interstices of logics or in boundary spanning positions may be reflexively aware of contradictory prescriptions and consequently provided with greater discretion in their organizational responses.

### *Structure*

Organizational decisions are influenced by those who bring to the decision process *their* interpretation of priorities and preferable outcomes (Chung & Luo, 2008; Ocasio, 1997). Actors, in this sense, are “carriers” (Zilber, 2002) and thus “represent” and give voice to institutional logics (Pache & Santos, 2010). D’Aunno et al. (1991) provided an early illustration of this phenomenon, showing that drug abuse treatment units that employed two professional groups were exposed to distinct professional logics because professionals “in” an organization speak about—and for—their beliefs. The structural division of labor within an organization, in this sense, creates intra-organizational communities which, connected to field-level occupational communities, are “quite likely to differ in their awareness of, and receptivity to, institutional pressures” (Delmas & Toffel, 2008: 1032). Institutional pressures, in other words, do not just “enter” an organization—they are interpreted, given meaning and “represented” by occupants of structural positions (see Greenwood & Hinings, 1996). It follows that the more differentiated and thus complex an organization, the greater the likelihood that it will experience institutional complexity.

This idea that actors “represent” and import into an organization the meanings and norms of logics to which they have been primarily exposed, suggests that the presence of multiple intra-organizational communities will not only heighten an organization’s experience of institutional complexity, but also influence its possible responses. Though this idea has intuitive appeal, it remains underdeveloped because it downplays four confounding factors.

First, the receptivity of organizational members to a given logic is affected by the thickness of ties—such as conference attendance, club memberships, training programs, etc.—linking them to the field-level institutional infrastructure (Delmas & Toffel, 2008; Kraatz, 1998; Lounsbury, 2001; Stevens, Steensma, Harrison, & Cochran, 2005; Weaver et al., 1999). These ties should not be taken for granted, nor assumed to be of equal salience. Even though connections between organizational members and the field at large are important mechanisms by which a particular logic imposes itself upon an organization (e.g., Lounsbury, 2001; Weaver et al., 1999; Westphal & Zajac, 2001), the degree to which internal “representatives” are committed to, and actively advocate, a particular logic can vary (for an example, see Binder, 2007). What matters, in other words, is not simply whether a logic is represented within an organization, but the thickness of the ties between

organization members and field-level referent audiences; the thicker the tie, the more likely the logic will insinuate itself into the organization.

A second confounding factor relates to the motivation and capability of social referents to enforce their demands. Zald and Lounsbury (2010) suggest that not only are centers of societal power variably dispersed, they also have varying degrees of influence. The key point here is that not all field-level agents police their logics with the same insistence and demand for compliance, nor are they *able* to. Malhotra and Morris (2009), for example, note that several historical contingencies have made it difficult for the engineering profession to maintain exclusive jurisdiction over their domain, resulting in a very low degree of social closure and a limited scope for cohesion or solidarity among its members. The extent to which a logic can penetrate an organization, in other words, is not just a matter of the presence of ties. Rather, it is influenced by the relative capability of social referents to utilize ties as channels to impose their demands on organizational members. The greater the number of referents capable of reinforcing and channeling their demands into the organization, the more constricted will be the organization as it seeks to respond.

A third confounding factor is the assumed “unitary” relationship between communities within an organization and their field-level equivalents. Communities differ with respect to the *extent* and *range* of the external social influences to which they are exposed. Organizational units in the “technical core,” for example, tend to be more buffered from the external environment than boundary-spanning units such as marketing or customer relations (Jones, 1999). While these latter units may display a lateral and more inclusive sensitivity to the demands of a wide array of field-level constituencies, the former may have a more “blinkered” sensitivity and a more closed orientation. We thus expect units in the technical core to be exposed and sensitized to a narrower range of logics than boundary-spanning units. Building on this assumption, it follows that a more nuanced conceptualization of the relationships between organizational communities and field-level social referents is warranted.

The last confounding factor that qualifies the basic idea that organizational members represent and give voice to field-level logics is the ability of large and/or high-status organizations to insulate their employees from external communities. Smets et al. (forthcoming; see also Grey, 1998), for example, found that large international law firms detach their professionals from the wider professional context (e.g., through their socialization processes), and in doing so effectively weaken their commitment to its strictures. In this way, large organizations soften the extent to which logics are articulated by “representatives” within its decision processes. Institutional immunity of this kind serves to reduce the number of logics articulated within the organization and thus the level of institutional complexity that will be experienced—while at the same

time, extending the organization's scope of discretion by minimizing potential sources of resistance.

In sum, organizational structure matters—first in shaping how organizations experience complexity and second, in determining the repertoire of organizational responses available. We therefore embrace Binder's (2007; see also Hallett & Ventresca, 2006) conceptualization of organizations as more than merely instantiations of institutional logics, rather they are places where people and groups make sense of, interpret, and enact institutional prescriptions. It is therefore important that future research examine the nature of the communities inhabiting organizations and the nature of their ties to field-level equivalents.

### *Ownership and Governance*

Organizational decisions are not simply a function of who participates. The relative degree of influence of a group within the organization also matters. Some groups are more powerful than others; as a result, organizational responses to multiple institutional logics are likely to be reflexive of the interests of the most influential group. Those with power, in other words, are likely to determine organizational responses to multiple institutional logics—and, in a way that reflects their interests. In other words, appreciation and recognition of logics, and the choice of which logic to prioritize and how to do so, will be dictated by those with power.

At least two approaches to the relationship between power and institutional complexity can be identified. One approach focuses upon ownership, of which an early expression is Goodrick and Salancik's (1996) analysis of how public and private hospitals differed in their responses to the appropriate use of caesarean operations. They found that where there is no ambiguity—in our terms, the logic is highly specific and provides limited discretion—hospital ownership had no effect. But under circumstances of ambiguity (low specificity), the market logic was given more priority in private than in public hospitals. Similarly, as we noted earlier, it is well established that strategies and decisions in family-owned and -managed firms are influenced by “community” norms rather than exclusively by those of the market (Chung & Luo, 2008; Miller et al., 2010). Further, organizations owned in part or whole by religious institutions exhibit “customized” receptivity to institutional complexity. Walsh, Weber, and Margolis (2003: 874), for example, found that “religious values that orient Catholic universities might prompt their faculty to focus on a more expansive set of business-society relationships than their peers at universities celebrated by the business community in the *Business Week* rankings.” The composition of ownership, in other words, shapes the relative receptivity of organizations to multiple logics.

Lounsbury's (2001) study of universities responding to environmental activists shows an indirect effect of ownership. Publicly funded universities diplomatically aligned their responses to the preference of governments from whom they receive funds. Put more generally, an organization's responses to institutional complexity will be affected by its dependence upon important institutional actors (see also Dobbin, Sutton, Meyer, & Scott, 1993; Edelman, 1992). These relational dependencies provide channels through which normative influences can flow and through which the risks of non-attention will be calculated; and, in consequence, they will shape an organization's response.

A different way by which ownership might affect organizational responses to institutional complexity focuses less upon *who* owns an organization than upon the *form* of ownership. Much organizational research is conducted in publicly traded corporations—hence the considerable attention to the role of boards of directors as conduits through which stakeholder interests and their normative preferences are represented (for a review, see Hillman & Dalziel, 2003). But other forms of ownership exist—including “partnerships” (e.g., Greenwood & Empson, 2003) and “not-for-profits” (Chen & O’Mahoney, 2011; Hwang & Powell, 2009)—that are distinguished by participation in decision processes that is wider and more inclusive than would be expected in the more hierarchically ordered publicly traded corporation. Our suspicion is that these types of organizations find responding to institutional complexity particularly problematic because of difficulties they experience in securing widespread cooperation and agreement (e.g., Cooper et al., 1996; Malhotra & Morris, 2009).

Power within organizations is not solely a function of formal ownership. A second approach to understanding the relationship between power and institutional complexity, therefore, focuses upon the governance role of different positions and groups (Jonsson, 2009; Sharma, Pablo, & Vredenburg, 1999; Shiplov et al., 2010). Fligstein (1990), for example, provides a striking illustration of how differences in institutional (regulatory) contexts are associated with the organizational ascendance of individuals possessing particular functional backgrounds (marketing, production, finance). Central to this thesis is that the competencies of chief executives tend to be aligned with demands of the regulatory context and that incumbents reflect and then embed their perspectives (i.e., their sensitivity to a particular logic) into organizational decisions and strategies.

Pache and Santos (2010) adopt a slightly different approach. Building upon Greenwood and Hinings (1996), they emphasize the *distribution* of power across occupational and/or functional groups. The challenge of constructing political coalitions is, of course, a traditional concern of organization theory (e.g., Cyert & March, 1963; Dalton, 1959; Pettigrew, 1983), which Pache and Santos (2010) extend by systematically linking patterns of intra-organizational power to likely resolutions of institutional complexity. Although Pache and

Santos restrict their analysis to only two logics, for us this represents a potentially fruitful focus for future research.

Despite different points of emphasis, all of the above approaches underline the role of power, reflected in ownership and governance arrangements, in affecting which logics will more easily flow into organizations and receive sympathetic attention. We suspect that the ownership structure is particularly significant for the institutionalized importation of *societal* logics (family, religion, markets) because these may be more formally embedded into the very institutions of ownership. In contrast, contestation fuelled by *field-level* logics—such as professional logics—are perhaps more usually resolved through the “representation” or “absence” of occupational groups within the formal organizational structure.

### *Identity*

Ownership and organizational structure have long been recognized as mechanisms connecting institutional processes and organizations. In contrast, the role of “identity” as a filter “for interpreting and *responding* to strategic issues and environmental changes” (Glynn, 2008: 408) is of more recent vintage (e.g., Dobbin & Kelly, 2007; Kaley, Dobbin, & Kelly, 2006; Dutton & Dukerich, 1991; Elsbach & Kramer, 1996; Fox-Wolfgramm et al., 1998; Gioia & Thomas, 1996; Lok, 2010; Meyer & Hollerer, 2010). Yet, Kraatz and Block (2008) are emphatic that institutional logics can drive behavior *only* after a specific identity is brought into play. King, Clemens, and Fry (2011) illustrate this argument, showing how the local institutional context of chartered schools in Arizona influenced identity realization at the organization level through mimicry and differentiation processes.

Identity should be considered at the organizational and institutional levels, which, to date, have evolved along separate tracks. For the most part, institutional theorizing has adopted an inter-organizational or field-level perspective (Wry, Lounsbury, & Glynn, 2011). Conversely, organizational identity scholars account for the tensions and contradictions that stem from competing identity claims within organizations (Albert & Whetten, 1985; Foreman & Whetten, 2002; Golden-Biddle & Rao, 1997; Pratt & Forman, 2000; Pratt & Corley, 2007). Recently, however, there have been attempts to recognize potential links between the institutional and organizational perspectives (Battilana & Dorado, 2010; Glynn, 2008; Pedersen & Dobbin, 2006; Pratt & Kraatz, 2009; Kraatz & Block, 2008).

At the institutional level, identity may be seen as a set of claims to “institutionally standardized social categories” (Glynn, 2008; Kraatz & Block, 2008; Pratt & Kraatz, 2009; Thornton, Ocasio & Lounsbury, in press; Whetten & Mackey, 2002: 397). That is, at this level, identity is less about the unique features of the organization than about its membership (or claims to membership)

in a social category or collective identity at the level of the organizational field (Glynn, 2008: 416; Lounsbury & Glynn, 2001; Ravasi & Schultz, 2006; Corley et al., 2006; King, Felin, & Whetten, 2010; Gioia, Price, Hamilton, & Thomas, 2010). For example, the labels “an accounting firm” or “a bank” or “a professional service firm” are derived from a socially prescribed category—constituted from field-level processes (Kennedy, 2008). Organizations make claims to membership in these categories, and, to the extent that they are successful, present themselves in particular ways (see Hsu, Kocak, & Negro, 2010). For example, Glynn and Abzug’s (2002) study of organizational names as key differentiating markers of organizational identity found that organizations were more likely to choose names that conform to prevalent practices in their institutional environment, and by doing so gain legitimacy by locating themselves within established institutional categories (see also Czarniawska & Wolff, 1998; King et al., 2010; Gioia et al., 2010).

Institutional identities, in this sense, matter because they shape an organization’s discretion when confronted with complexity. Certain options are precluded because they lack “fit” with a given social category. For example, the advertising agency Saatchi & Saatchi lost its credibility when it sought to move into the banking industry. Its initial institutional identity—as an advertising agency—was at odds with such a move and led to loss of institutional endorsement. It follows that, to the extent that an organization values its institutional identity, and/or to the extent that an identity is simply taken for granted (“we are a bank,” “we are a university,” “we are a church”), it will shape how an organization will perceive and respond to institutional complexity. To date, however, we know relatively little about how these processes work.

At the organizational level, identity is concerned with attributes that define the organization as different from other organizations—especially those sharing the same institutional category (Albert & Whetten, 1985; Dutton & Dukerich, 1991; Lerpold, Ravasi, Van Rekom, & Soenen, 2007; Rindova & Schultz, 1998; Stryker & Burke, 2000; King et al., 2010). At this level, identity has been shown to influence how expectations and pressures are prioritized; and, perhaps more so, it has been shown to shape which repertoires of possible responses are assessed and selected (e.g., Fox-Wolfgramm et al., 1998; Sharma, 2000; Glynn, 2008).

In sum, institutional and organizational identities *complement* the traditional emphasis placed upon the role of “structural” representation. Therefore, we follow Kraatz and Block (2008) in recommending an explicit embracing of institutional and organizational identities in order to understand how organizations cope with institutional complexity. Incorporating identity as a filter, however, should keep in mind two circumstances: first, whether organizational actors perceive the identity positively or negatively; and second, the strength of the identity. How identity is perceived is emphasized by Dutton, Roberts, and Bednar (2009: 7), for whom the drive to build a

“positive identity” is a “basic tenet of many identity theories.” When responding to institutional complexity, organizational members may attempt to preserve and protect positive aspects of their identity, resisting or embracing field-level pressures depending on their alignment with that identity (e.g., Dutton et al., 2009; Dutton & Dukerich, 1991; Fox-Wolffgramm et al., 1998; Sauder & Espeland, 2009). Perception of identity as positive or negative, in other words, filters the interpretation of institutional complexity and possible responses to it. The “strength” of an organizational identity is the extent to which it is deeply shared (Kreiner & Ashforth, 2004), and the stronger the identity the more it will condition an organization’s approach to institutional demands. For example, both Milliken (1990) and Gioia and Thomas (1996) imply that a strong sense of organizational identity will reinforce an organization’s confidence in its ability to ignore or comply with external demands—that is, identity strength will affect the degree of discretion assumed by the organization.

Although examination of identity in the processing of institutional pressures is still nascent, we suspect that it is a critical filter, especially in the assessment of discretion and the appropriateness of alternative repertoires of action and responses. For this reason, connecting institutional complexity and identity studies should be a high priority and, as we show in the next section, it is attracting increasing attention.

### Organizational Responses

As intimated earlier, growing interest is being given to how organizations respond to institutional complexity. Not surprisingly, these initial explorations are selective in their scope but suggest promising lines of research. For convenience, they can be considered according to whether they focus upon *organizational strategies* or *organizational structures*.

#### *Strategies*

Studies interested in the “strategies” adopted by organizations in their efforts to handle institutional complexity examine whether and to what extent organizations embrace prescriptions urged upon them by field-level referent audiences and seek to explain how those preferences are determined. The most explicit attempt to provide a framework for this purpose is by Pache and Santos (2010), for whom, as noted in the previous section, the strategy adopted by an organization will be at least partly a function of whether multiple logics are directly represented within an organization. To the extent that representatives of logics have voice, organizational responses—such as the prioritization of logics—will be determined by the relative power of each logic’s representative. Thus, when only one logic is represented, it is that logic that will be

embedded in organizational decisions and behaviors. In contrast, when multiple logics are represented, the outcome will depend upon the distribution of power within the organization. Heimer (1999), similarly, emphasizes participation as an important determinant of the relative influence of competing logics, but for her what matters is the status of those “carrying” the logic and the nature of their involvement in decision-making. Actors who routinely participate in organizational decisions (e.g., physicians in hospitals) are more influential than participants whose involvement is “part-time” (e.g., parents of patients).

We have already pointed out that distributions of voice and intra-organizational power are, in part at least, influenced by the relationship/ties between representatives within an organization and their field-level referents. Nevertheless, by pointing to the presence and power of advocates of institutional logics, the Pache and Santos/Heimer approach reminds us that group interests, motivations and political skills are important. It also reminds us that institutional accounts can be usefully combined with resource dependency theory—as pioneered by Oliver (1991)—and the strategic contingencies’ theory of power (Hickson, Hinings, Schneck, Lee, & Pennings, 1971). The response of an organization to competing logics, in other words, is partly a function of how logics are given voice within the organization; but the ability of a voice to be heard is linked to the influence of that logic’s field-level proponents over resources—including legitimacy—that they control.

A very different and more recent approach to understanding how organizations might prioritize and/or adapt to multiple logics is put forward by Kraatz and Block (2008; see also Pratt & Foreman, 2000; Glynn, 2008; and Pratt & Kraatz, 2009). They start, correctly, from the assumption that organizations are not passive recipients of institutional prescriptions but interpret, translate and, in some instances, transform them. One way by which such interpretations occur, as we noted in the previous section, is through organizational identities. Developing this idea, Kraatz and Block propose that organizations can enact four different types of responses. First, they could resist or eliminate the tensions of complexity by deleting or marginalizing one or more institutionally-derived identities—in effect, Oliver’s (1991) strategy of resistance is deployed towards some institutional prescriptions in the name of a strong commitment to a preferred identity (for an example, see King et al., 2010). Second, they could strive to balance the various institutional demands by increasing the cooperativeness among identities and forging links among them (Pratt & Foreman, 2000; Binder, 2007). Third, organizations might emerge as “institutions in their own right,” building durable identities that immunize the organization against external and multiple pressures for compliance. In effect, the organization detaches itself—to a degree—from its institutional setting. Finally, organizations could relate to various institutional

constituencies by “compartmentalizing” identities (Binder, 2007; Pratt & Foreman, 2000).

Institutionalists often consider compartmentalization as a form of decoupling whereby an organization gives only ceremonial and symbolic commitment to certain logics while preserving a core identity. Hamilton and Gioia (2009) provide a compelling illustration of this strategy, emphasizing “greenwashing” as an instrumental attempt of some organizations to imbue their organization with a “green identity” in response to institutional pressures. Lyon and Maxwell (2011), similarly, highlight how organizations enact symbolic activities to signal their commitment to philanthropy and environmentalism and direct the field’s attention to them. The authors draw attention to the accusations of greenwashing levied by nongovernmental organizations against BP after its attempts to divert attention from its petroleum exploration activities towards the company’s investments in renewable energy.

According to Boxenbaum and Jonsson (2008: 90), there has been “a surge in attention to decoupling in recent years” and much has been learned about the circumstances that precipitate and motivate its adoption, including its use as a coping response for handling institutional complexity (e.g., Aurini, 2006; Binder, 2007; George, Chattopadhyay, Sitkin, & Barden, 2006; Lok, 2010). Nevertheless, Boxenbaum and Jonsson (2008: 88) point to the need for still further research, especially into the impact of decoupling strategies upon *intra-organizational* factors such as employee morale and productivity, and into “the conditions under which organizations can continue to decouple their structures from their practices” (on this point, see also Hernes, 2005).

To these suggestions we would add the importance of better understanding how organizations are able to use noncompliant structures by rhetorically “framing” them in such a way that the organization successfully avoids social penalties (Elsbach & Sutton, 1992; Deephouse & Suchman, 2008). We also suggest that the motivations behind decoupling be examined—for example, Binder (2007) and Tilcsik (2010) offer contrasting observations to Ansari, Fiss, and Zajac (2010) and Westphal and Zajac (2001). Further, we need to better understand the longer-term implications of decoupling (see for example, Hallett, 2010; Sauder & Espeland, 2009; and Tilcsik, 2010). Further, not all decoupled structures are a deliberate strategic response to complexity (e.g., see Weaver et al., 1999) and not all of them remain decoupled—on the contrary, intendedly ceremonial practices may, over time, “take over” the organization (Edelman, 1992). Some decoupling activities, moreover, may have unintended effects on the focal organization’s identity and precipitate further tensions and realignments (Hamilton & Gioia, 2009; Sahlin & Wedlin, 2008). It is thus unfortunate that we seem to lack the theoretical language to talk about the unwitting consequences of strategies of decoupling. Decoupling, although an important and well-recognized organizational

response, deserves further and closer attention in order to isolate its different forms and outcomes.

All of the above studies—whether they focus upon organizational representation and voice, intra-organizational power, or identity and decoupling—seek to explain why an organization might adopt a particular strategy for handling competing logics—at a particular point in time. As such, they follow the line of research opened by Oliver (1991). Yet, most empirical studies assume or imply that organizations enact *single* and *sustainable* responses. In doing so, they largely ignore the fact that “different subunits... find heterodox ways of responding to the accountability demands of [their] environment” (Binder, 2007: 567). They also disregard the possibility of temporary adjustments to the same institutional pressures and give no attention to the possibility of cycles of organizational responses. Yet, as Tilcsik (2010: 37) reminds us, “an organization that complied with institutional pressures a year ago may resist them today, and an organization that used to circumvent a mandate may have embraced it by now.” The sustainability of organizational responses and their alteration and variability across time is a neglected but important theme that deserves serious attention.

Furthermore, to fully appreciate the strategic responses of organizations to institutional complexity we need to go further than noting why particular logics are given salience. We need to understand how an organization handles the potential loss of field-level endorsement from actors whose prescriptions are ignored. Almost all of the works summarized above explain which logics are the “winners” and why. But organizations also have to manage the “losers.” Yet, we have little appreciation of how they do so—other than by suggesting that ceremonial conformity might be used (with the implicit assumption that field-level actors are blind to this strategy or accepting of it). Do some organizations—e.g. smaller or newer organizations—fly under the institutional radar and have greater discretion over how to respond? Are high-status and resource-rich organizations more, or, less, able to resist institutional demands? Does field-level structural position, in other words, matter? What strategies are used to minimize social penalties, and what are the implications for organizations of using them? Finally, how much strategic discretion do organizations really have—could they, for example, “delete” a logic in the way that Pratt and Foreman (2000) assume that identities can be divested?

### *Structures*

A different approach to studying organizational responses to institutional complexity focuses upon how multiple logics are reflected in the organization’s structures and practices. Interestingly—and usefully—there is some similarity with the debate over organizational ambidexterity, which concerns how organizations can achieve the benefits of “exploitation” and “exploration,” typically

portrayed as incompatible learning processes (for a review, see Lavie, Stettner & Tushman, 2010). This debate is replete with terms such as “paradoxical cognitive frames” (Smith & Tushman, 2005), “inherent contradictions” (Lavie et al., 2010), and “paradoxical challenges” (Jansen, Tempelaar, Van den Bosch, & Volberda, 2009), and is thus similar to that raised here; indeed, it could be argued that the ideas of “exploitation” and “exploration” are analogous to logics. But there is a fundamental difference: the ambidexterity debate is not concerned with attempts to achieve social endorsement/legitimacy from external referents, but with constructing internal capabilities. Nevertheless, it makes sense to seek insights from the more developed ambidexterity debate.

One initial insight that can be drawn from the ambidexterity literature relates to the potential distinction between two types of structures—“blended” and “structurally differentiated” hybrids (Simsek, 2009). The former seek to synthesize processes of exploitation and exploration within the same organizational unit, whereas the latter partitions—compartmentalizes—them into separate units. Similar structural options have appeared in the institutional complexity debate. They also resonate with the distinction drawn in the identity literature between “holographic” and “ideographic” hybrid identities (Albert & Whetten, 1985; Golden-Biddle & Rao, 1997; Pratt & Corley, 2007; Pratt & Rafaeli, 1997).

*Blended hybrids.* Most analyses of blended hybridization concern attempts to combine and layer “practices” taken from different logics into a single organization (e.g., Binder, 2007; Chen & O’Mahoney, 2011; D’Aunno et al., 1991; Lounsbury & Crumley, 2007; Pache & Santos, 2011; Rao et al., 2003; Smets et al., forthcoming; Weaver et al., 1999; Zaheer, 1995; Tracey et al., 2011). A common conclusion is that hybridization can successfully secure endorsement by field-level actors *and*, at the same time, achieve effective performance (although the longer-term implications are not always considered—but see Pache & Santos, 2010; and Rao et al., 2003).

In reaching this conclusion, most studies assume that organizations *wittingly* manage their responses to multiple logics—i.e. reflexivity and agency is clearly implied (see Boxenbaum & Jonsson, 2008)—and are thus in line with the “inhabited institutions” perspective (Hallett & Ventresca, 2006). In contrast, largely absent is the earlier institutional insight that organizations *unwittingly* respond to taken-for-granted practices. Managing logics, in this imagery, therefore, is akin to managing ambidexterity, which, to us, is a reasonable assumption and one that is consistent with Seo and Creed’s (2002) proposition that the locus of “contradictions” generates reflexivity. However, it would be interesting to learn whether organizations experiencing enduring and stable institutional complexity develop blended hybrid arrangements that, over time, become institutionalized *within* the organization and thus uncontested “settlements” (Rao & Kenney, 2008)—or, whether there is

ongoing tension and contestation and continual reflexivity (e.g., Hallett, 2010). It would also be interesting to learn whether successful variants of these novel configurations subsequently diffuse through the organizational field. And, do novel configurations adopted by some organizations—for instance, those of high status—more readily feedback to the field and reshape institutional prescriptions?

Another interesting yet under examined question—and one that parallels the ambidexterity debate—is how the integration of hybrid practices is actually achieved. Some insights to this question are provided by Battilana and Dorado (2010), who compared the attempts of two microfinance banks in Bolivia to create new organizations that used practices drawn from two very different logics. Interestingly, one bank succeeded whereas the other failed. These different outcomes arose from deployment of particular human resource practices which, in the successful bank, helped construct a new organizational identity. Fundamentally, the successful bank avoided hiring anyone with a previous attachment to either logic because individuals who had such previous attachments were simply not open to other ways of working. According to Battilana and Dorado (2010), zero prior experience with a logic is a prerequisite for blended hybridization, which implies that the blending of logics in an *existing* organization would be very difficult (e.g., see Ferlie, Fitzgerald, Wood, & Hawkins, 2005).

The important role of human resource practices is similarly noted in the organizational ambidexterity literature (Kang & Snell, 2009). However, there is *no* consideration in the ambidexterity literature of whether ties to field-level intermediaries might complicate or undermine the hybridization process. From an institutional perspective, such a blinkered focus would be difficult to accept. Our interpretation of Battilana and Dorado (2010), therefore, is that the means whereby organizations successfully blend logics is through construction of a “strong” and “positive” organizational identity that reconciles and outweighs the multiple isomorphic pulls of the field.

The role of organizational identity and its ability to *weaken* attachments to field-level logics is consistent with our earlier discussion, where we noted that the influence of institutional logics depends upon the relationship between individuals or groups within an organization and field-level intermediaries that support and promote those logics. Smets et al. (forthcoming), who studied how professionals from two very different legal jurisdictions—Germany and the UK—realigned their international banking practices, also speak to this issue. As with Battilana and Dorado’s (2010) Bolivian banks, the organizational vehicle in which the realignment took place—a transnational law firm—was “new.” Unlike Battilana and Dorado’s banks, however, lawyers in the Smets et al.’s case had strong and positive attachments to *their* professional logics. Nevertheless, German lawyers adapted their identity and working practices to the UK logic and, as in the Battilana and Dorado

study, human resource practices played an important role. But Smets et al. (forthcoming) go further and emphasize two other organizational features. First, the law firm in which professionals became detached from their field-level communities was an *elite* organization able to insulate its members from their external profession. Second, the firm's *identity* as an international firm was reinforced by a network of relationships between the firm, its clients and other elite firms, and those relationships uniformly promoted one logic over the other. In other words, features of the organization are important influences upon the blending of logics. What these features are, and the circumstances that heighten their significance, are ill-understood issues.

The construction of organizational identity is increasingly recognized by institutional researchers as an important mechanism through which to understand how organizations cope with institutional complexity (e.g., Creed, DeJordy, & Lok, 2010; Glynn, 2008; Kodeih, 2010; Kraatz & Block, 2008; Lok, 2010; Rao et al., 2003). These studies imply that a hybrid identity allows the institutionalization within organizations of practices associated with different logics. Yet Lok (2010: 1307) cautions that the construction of a hybrid identity "may be more complex and contingent than extant theory suggests." Ashforth and Johnson (2001), for example, note that nested identities are not always consistent and may even conflict, such that an identity lodged at one level may serve as a foil for an identity lodged at another level (see also Hallett, Schulman, & Fine, 2008).

These early studies of blended hybridization raise interesting questions that warrant further research. We especially encourage research on how institutional complexity and organizational responses are shaped by the relationship of organizational identity processes to the broader dynamics of institutional identities as embedded in field-level categorizations and other forms of collective identity. It would also be useful to study how hybrid identities linked to institutional complexity relate to organizational outcomes such as endorsements or penalties from field-level actors, including high-status peers (Hsu et al., 2010; Zuckerman, 1999). And while this line of development underlines organizational discretion—Pratt and Foreman (2000: 18), for example, unabashedly declare that "multiple organizational identities can and should be managed"—close conceptual attention will need to be paid to the actual scope for agency.

*Structural differentiation.* In the structurally differentiated hybrid, separate subunits deal with particular logics, essentially partitioning/compartmentalizing an organization into different mindsets, normative orders, practices and processes (Anand, Gardner, & Morris, 2007; Kraatz & Block, 2008; Pratt & Foreman, 2000). Understanding how hybrid structures function is, of course, a longstanding interest of organization theory and has been approached from many theoretical perspectives. Lawrence and Lorsch (1967), working in the structural-contingency perspective, analyzed the complementary

relationship between structural differentiation and integrative processes and placed it at the forefront of the organizational theory agenda. Similarly, “organizational ambidexterity” was initially treated as virtually synonymous with structurally differentiated hybrids rather than as one of several possible structural designs (see Simsek, 2009, for a review). Despite this longstanding interest in the relationship between differentiation and integration, empirical analyses of structural hybrids from an institutional perspective are relatively scarce (recent exceptions include Binder, 2007; Goodrick & Reay, *in press*; Kostova, 1999; Jarzabkowski et al., 2010; Reay & Hinings, 2009).

Neglect of structural hybrids is surprising, given that they are easily visible in the organizational landscape—universities, hospitals, multinational enterprises, professional service firms, etc., are *all* examples. Moreover, most are seen as legitimate and even expected to exhibit hybrid characteristics. Universities, for example, and hospitals, are legitimate only if they use hybrid structural arrangements, hosting multiple professional disciplines *and* balancing professional and commercial goals. Further, they are expected to respect the norms of community logics, both in their relationships with students/patients *and* with local communities in which they are located. In other words, various organizations often have an “institutional identity” that prescribes that they use the structurally differentiated hybrid. In these contexts, the legitimacy of a subunit is dependent upon the existence of other subunits, which aggregate to the categorical criteria of “a hospital” or “a university.” Nevertheless, the boundary of a hybrid organization may be disputed and subject to change, triggering institutional responses. For example, inclusion of management consulting activities questioned and compromised the institutional identity of accounting firms, generating organizational and field-level struggle (e.g., Suddaby & Greenwood, 2005). Similarly, Lounsbury and Crumley (2007) examined resistance to the introduction of non-traditional practices into the mutual fund industry.

It would be interesting to learn more about the boundary management practices of structural hybrids. For instance, how, if at all, are institutional identities maintained when organizations diversify and hire practitioners who “represent” different logics? What are the field-level mechanisms that support or dispute these institutional identities? And, of particular importance for our purpose, how are institutional identities represented within the structurally differentiated hybrid, and how do they connect to its longevity?

Two other overriding tensions deserve examination. The assumption typically observed, albeit implicitly, is that units require at least some measure of integration. Yet, structural compartmentalization—especially in institutional terms—militates *against* cooperation. Ferlie et al. (2005: 129) strikingly illustrate this phenomenon in hospitals, which, they say, are characterized by “cellular, self-sealing, and institutionalized” boundaries. Similarly, Simsek (2009: 604), an exponent of ambidexterity, notes that “dual structures within the

same organization... [can] lead to isolation and the failure of individual units to productively couple their efforts." Carlile (2002: 442), in a nuanced analysis of knowledge sharing across functional departments, shows how characteristics of knowledge *within* a function "actually hinders problem solving and knowledge creation *across* functions." The paradox, therefore, is that designing the division of labor to align with multiple institutional logics in order to secure multiple institutional endorsements may result in highly conservative and fragmented organizations. This tension, of course, between the impulse for structural differentiation and the imperative for organizational coordination, is, as pointed out above, the perennial interest of contingency theory, and it is similarly important for institutional accounts. We need to know much more about the challenges associated with hybrid structures.

Various clues as to how integration is attempted are offered by the organizational ambidexterity literature, which highlights several factors. These include the need for "ambidextrous leaders" with the ability to understand the requirements of different types of businesses, the authority to implement new incentive systems to institutionalize the ambidextrous approach and to minimize internal resistance, and the skills to communicate clearly their approach in order to offset any media skepticism (e.g., O'Reilly & Tushman, 2004; Jansen et al., 2009; Fang, Lee, & Schilling, 2010; Benner & Tushman, 2003; Siggelkow & Levinthal, 2003). In institutional terms, conflicting external pressures highlight the need for leaders who are able to understand, and are sensitive to, the expectations and requirements of constituencies of multiple logics, and can consequently make both symbolic offerings and substantive claims about the organization's rightful membership of multiple institutional categories (Kraatz, 2010; Pratt & Kraatz, 2009).

In exploring the role of integrative arrangements within structurally differentiated organizations, and how they are influenced by field-level linkages, it would be useful to incorporate a dynamic perspective (as deployed by Jarzabkowski et al., 2010). Hybrids are not static entities and relationships across units can shift, with important consequences. For example, large accounting firms are typically hybrids, structurally recognizing at least two logics—the professional logic underpinning accounting and the more commercial logic of consulting. For some organizations—e.g. Arthur Andersen—the latter rose from a supportive to a dominant role, with adverse consequences for the organization. How hybrids manage relationships across specializations, how those relationships evolve, and with what implications, are important yet underexamined questions that deserve serious attention.

### *The Effects of Organizational Responses on Field Structure and Institutional Pluralism*

While our effort in this paper concentrates attention on how organizations respond to institutional complexity, it is important to highlight that

future research must also address how organizational responses have feedback effects on field structure and institutional pluralism. Institutional analysis has always been insistent on the need to analyze the top-down effects of institutional pressure, such as that emanating from logics, on organizational behavior. In contrast, systematic attention to how organizational actions might facilitate field-level institutional change or institutional maintenance has been less emphasized (but see Lok, 2010; Lounsbury & Crumley, 2007; Powell & Colyvas, 2008; Smets et al., forthcoming). Yet it is clear that the aggregation of organizational responses to complexity, whether coordinated or not, can have important effects on field structure or institutional pluralism.

For example, the rise of a market logic in higher education publishing could not have occurred absent the growing use of performance criteria to hire and fire managers of higher-education publishing houses (Thornton & Ocasio, 1999). A similar imagery is provided by Scott et al. (2000), who tracked the shifting ecology of professional identities and organizations in the Bay area healthcare field and showed how it enabled the rise of a more pluralistic set of logics involving the state, the corporation, and the market. Alongside such evolutionary transformations in logic pluralism was the creation of a more centralized healthcare field structure. The key issue here is that field creation and change must not be understood as an exogenous event, but as something that is socially constructed by organizations via their decision-making and their ongoing and cumulative responses to institutional complexity. Clearly, an important area for future research will be to understand how organizations in a field can give rise to a more institutionally complex situation, or intensify or de-intensify the pressures of complexity at the field level.

## Conclusions

In this paper, we have built upon the rapidly growing institutional logics perspective to zoom in on how organizations respond to institutional complexity—situations where organizations experience a multiplexity of different pressures from a plurality of institutional logics. While the extant literature has highlighted how shifts in logics or the existence of plural (usually two) logics affect organizations across a field, much less systematic attention has been paid to how individual organizations experience and respond to the complexity that arises. We have drawn on a variety of cognate literatures as well as published work on institutional logics to develop a multilevel analytic framework to guide future scholarship on organizational responses to institutional complexity. Given the lack of research on the topic, some aspects of the framework are naturally speculative, and will need to be refined and elaborated by empirical research on the topic.

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## Endnotes

1. There is, of course, an extensive literature on family businesses exploring how “family” influences commercial behavior, but this very rarely connects to the institutional perspective.
2. It is interesting to note that field-level constructs such as fragmentation and formalization are reminiscent of the constructs early organizational theorists used to describe *organizational* structures (e.g., Pugh, Hickson, Hinings, & Turner, 1968). The ways that institutional structure co-mingles with organizational structure and the extent to which similar constructs might translate to multiple levels of analysis is an intriguing avenue of future research. We thank Jim Walsh for this insightful comment.

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