

ON PRACTICE AND INSTITUTION

RESEARCH IN THE SOCIOLOGY OF ORGANIZATIONS

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RESEARCH IN THE SOCIOLOGY OF
ORGANIZATIONS VOLUME 71

ON PRACTICE AND INSTITUTION: NEW EMPIRICAL DIRECTIONS

EDITED BY

MICHAEL LOUNSBURY

University of Alberta, Canada

DEBORAH A. ANDERSON

University of Oxford, United Kingdom

AND

PAUL SPEE

University of Queensland, Australia



United Kingdom – North America – Japan
India – Malaysia – China

Emerald Publishing Limited
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LIST OF CONTRIBUTORS

<i>Deborah A. Anderson</i>	Saïd Business School, University of Oxford, UK
<i>Diane-Laure Arjaliès</i>	Ivey Business School, Western University, Canada
<i>Imran Chowdhury</i>	Wheaton College, USA
<i>Roger Friedland</i>	The University of California, Santa Barbara, USA
<i>Arthur Gautier</i>	ESSEC Business School, France
<i>Thorvald Hærem</i>	BI Norwegian Business School, Norway
<i>Muhammad Aneeq Ismail</i>	Warwick Business School, UK
<i>Farah Kodeih</i>	Aalto University School of Business, Finland
<i>Waldemar Kremser</i>	Institute for Management Research, Radboud University Nijmegen, The Netherlands
<i>Marion Ligonie</i>	IESEG School of Management, France
<i>Peng Liu</i>	Steven G. Mihaylo College of Business and Economics, California State University, USA
<i>Michael Lounsbury</i>	University of Alberta School of Business, Canada
<i>Davide Nicolini</i>	IKON, Warwick Business School
<i>Anne-Claire Pache</i>	ESSEC Business School, France
<i>Brian T. Pentland</i>	Eli Broad College of Business, Michigan State University, USA
<i>Paolo Quattrone</i>	University of Manchester, UK
<i>Juliane Reinecke</i>	Kings College London, UK
<i>Henri Schildt</i>	Aalto University School of Business & Aalto University School of Science, Finland
<i>Jose Bento da Silva</i>	Warwick Business School, UK
<i>Paul Spee</i>	University of Queensland, Australia
<i>Hani Tarabichi</i>	Aalto University School of Science, Finland
<i>Milo Shaoqing Wang</i>	University of Alberta School of Business, Canada

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RESEARCH IN THE SOCIOLOGY OF ORGANIZATIONS ADVISORY BOARD (REV. AUGUST 2020)

Series Editor

Michael Lounsbury
Professor of Strategic Management & Organization
Canada Research Chair in Entrepreneurship & Innovation
University of Alberta School of Business
3-23 Business Building
Edmonton, Alberta T6G 2E7 CANADA
ph (780) 492-1684; email: ml37@ualberta.ca

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FOREWORD: RESEARCH IN THE SOCIOLOGY OF ORGANIZATIONS

Research in the Sociology of Organizations (RSO) publishes cutting edge empirical research and theoretical papers that seek to enhance our understanding of organizations and organizing as pervasive and fundamental aspects of society and economy. We seek provocative papers that push the frontiers of current conversations, that help to revive old ones, or that incubate and develop new perspectives. Given its successes in this regard, RSO has become an impactful and indispensable fount of knowledge for scholars interested in organizational phenomena and theories. RSO is indexed and ranks highly in Scopus/SCImago as well as in the Academic Journal Guide published by the Chartered Association of Business schools.

As one of the most vibrant areas in the social sciences, the sociology of organizations engages a plurality of empirical and theoretical approaches to enhance our understanding of the varied imperatives and challenges that these organizations and their organizers face. Of course, there is a diversity of formal and informal organizations – from for-profit entities to non-profits, state and public agencies, social enterprises, communal forms of organizing, non-governmental associations, trade associations, publicly traded, family owned and managed, private firms – the list goes on! Organizations, moreover, can vary dramatically in size from small entrepreneurial ventures to large multi-national conglomerates to international governing bodies such as the United Nations.

Empirical topics addressed by *Research in the Sociology of Organizations* include: the formation, survival, and growth of organizations; collaboration and competition between organizations; the accumulation and management of resources and legitimacy; and how organizations or organizing efforts cope with a multitude of internal and external challenges and pressures. Particular interest is growing in the complexities of contemporary organizations as they cope with changing social expectations and as they seek to address societal problems related to corporate social responsibility, inequality, corruption and wrongdoing, and the challenge of new technologies. As a result, levels of analysis reach from the individual, to the organization, industry, community and field, and even the nation-state or world society. Much research is multi-level and embraces both qualitative and quantitative forms of data.

Diverse theory is employed or constructed to enhance our understanding of these topics. While anchored in the discipline of sociology and the field of management, *Research in the Sociology of Organizations* also welcomes theoretical engagement that draws on other disciplinary conversations—such as those in political science or economics, as well as work from diverse philosophical traditions. RSO scholarship has helped push forward a plethora theoretical conversations on

institutions and institutional change, networks, practice, culture, power, inequality, social movements, categories, routines, organization design and change, configurational dynamics and many other topics.

Each volume of *Research in the Sociology of Organizations* tends to be thematically focused on a particular empirical phenomenon (e.g., creative industries, multinational corporations, entrepreneurship) or theoretical conversation (e.g., institutional logics, actors and agency, microfoundations). The series publishes papers by junior as well as leading international scholars, and embraces diversity on all dimensions. If you are scholar interested in organizations or organizing, I hope you find *Research in the Sociology of Organizations* to be an invaluable resource as you develop your work.

Professor Michael Lounsbury
Series Editor, *Research in the Sociology of Organizations*
Canada Research Chair in Entrepreneurship & Innovation
University of Alberta

ON PRACTICE AND INSTITUTION

Michael Lounsbury, Deborah A. Anderson and
Paul Spee

ABSTRACT

Volumes 70 and 71 of Research in the Sociology of Organizations combine to comprise cutting edge theory and empirical scholarship at the interface of practice and institution in organization studies. As we highlight, this interface has spurred particularly generative conversations with many open questions, and much to explore. We provide a review of scholarly developments in practice theory and organizational institutionalism that have given rise to this interest in building a bridge between scholarly communities. As signaled by recent efforts to construct a practice-driven institutionalism, we highlight how connecting practice theory with the institutional logics perspective provides a particularly attractive focal point for scholarship at this interface due to a variety of shared ontological and epistemological commitments, including the constitution of actors and their behavior. Collectively, the papers assembled unlock exciting opportunities to connect distinct, but related scholarly communities on practice and institution, seeding scholarship that can advance our understanding of organizational and societal dynamics.

Keywords: Practice theory; organizational institutionalism; Theodore Schatzki; Roger Friedland; practice-driven institutionalism; institutional logics

You can't fight in here. This is a war room!

– Dr Strangelove

The concepts of practice and institution have attracted a substantial amount of scholarly attention, spanning many diverse debates across the social sciences and humanities. Given that the literature on practice and institution is vast and multi-faceted, we concentrate attention on two traditions in organization studies that have

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been at the forefront of efforts to integrate these conceptual terrains – organizational institutionalism (e.g., Greenwood, Lawrence, Meyer, & Oliver, 2017) and practice theory (e.g., Schatzki, Knorr-Cetina, & von Savigny, 2001). This union, while still nascent, has already been generative, catalyzing a great deal of scholarly excitement. While organizational institutionalism and practice theory are prominent organization studies traditions in their own right (Lounsbury & Beckman, 2015; Meyer & Boxenbaum, 2010), the interface between them has in various ways contributed to scholarly developments related to institutional logics (Thornton, Ocasio, & Lounsbury, 2012), institutional complexity (Greenwood, Raynard, Kodeih, Micelotta, & Lounsbury, 2011), institutional work (Lawrence, Zilber, & Leca, 2013), microfoundations of institutions (e.g., Cardinale, 2018; Haack, Sieweke, & Wessel, 2020; Harmon, Haack, & Roulet, 2019), strategy-as-practice (Vaara & Whittington, 2012), as well as practice-driven institutionalism (PDI) (Smets, Aristidou, & Whittington, 2017).

Early efforts to seed the interface between practice and institution scholars was motivated in part by the observation that organizational institutionalism had developed a rather thin approach to the study of practice, conceptualizing practice as enmeshed in institutions; conversely, practice theory tends to flip the emphasis, providing a rather thin conceptualization and analysis of institutions (Furnari, 2014; Jarzabkowski, Smets, Bednarek, Burke, & Spee, 2013; Lounsbury & Crumley, 2007; Smets et al., 2017; Spee, 2021; Whittington, 2006). Given that scholarly interest in integrating practice and institution in organization studies has grown dramatically over the past couple of decades, it seems timely to take stock of developments in both of these traditions, identify opportunities to achieve more conceptual and analytical balance between them, and sketch some possibilities for novel scholarly collaboration and knowledge development.

Whilst perhaps not immediately apparent, the foundations of organizational institutionalism and practice theory share important similarities. First, organizational institutionalism and practice theory have ideational roots in contemporary social theory, sociology, and philosophy. Such commitments to engage broader ideas outside the discipline provide a conducive foundation to explore ontological and epistemological issues underlying core arguments and evidence. Second, the foundations of organizational institutionalism and practice theory build on similar grounds, rejecting rational choice theory and embracing process-based approaches to understanding social life (cf., Bourdieu, 1977; Giddens, 1984; Schatzki, 2002). Although the possibilities for collaborative and productive dialogue among practice and institution scholars face many land mines (Reay, Zilber, Langley, & Tsoukas, 2019; Zilber, Lounsbury, & Anderson, 2021), the fecundity of their complementarity is stressed here.

Contributions to this double volume (Volumes 70 and 71 of *Research in the Sociology of Organizations*) are an offspring of recent workshops focused on cultivating a more productive interface between practice and institution scholars. Deborah A. Anderson and Michael Smets organized two widely attended professional development workshops (PDWs) on “PDI” at the Academy of Management in August 2018 and 2019. These workshops involved many leading as well as junior scholars of practice and institution across Europe and North

America. The 2018 PDW was a particularly special event because it featured an engagement between Ted Schatzki, a leading practice theorist, and Roger Friedland, the progenitor of the institutional logics perspective. Somewhat surprisingly, Schatzki and Friedland found common ground and generated a great deal of excitement about the possibilities of forging deeper linkages between their theoretical orientations. To advance the dialogue between Schatzki and Friedland, and practice theory and the institutional logics perspective more generally, Michael Lounsbury organized a more intimate workshop at the University of Alberta in December 2018. This turned out to be a congenial forum where Schatzki and Friedland, along with a small handful of workshop participants, more deeply explored possibilities at this interface.

Building on these vibrant discussions, this double volume aims to encapsulate some of the theoretical insights generated during these gatherings as well as feature contributions stemming from empirical scholarship at the juncture of practice and institution. While efforts to conjoin Schatzki's practice theory with Friedland's conceptualization of institutional logics is especially noteworthy and novel, various contributors have explored possibilities beyond this locus. The contributions as a whole point to the multifaceted relation of practice and institution, providing a robust platform to shape future research. This double volume also complements and extends previous volumes within *Research and Sociology of Organizations on Institutional Logics in Action* (Lounsbury & Boxenbaum, 2013), *Microfoundations of Institutions* (Haack et al., 2020), *How Institutions Matter* (Gehman, Lounsbury, & Greenwood, 2016), *Agents, Actors, Actorhood: Institutional Perspectives on the Nature of Agency, Action, and Authority* (Hwang, Colyvas, & Drori, 2019) and on *Macrofoundations: Exploring the Institutionally Situated Nature of Activity* (Steele, Lounsbury, & Anderson, 2021).

While the concept of practice has been frequently invoked in organizational institutionalism (Greenwood et al., 2017), it has had an especially prominent role in the institutional logics perspective given that the very definition of logics from the outset focused on the entanglement of symbolic ideas and material practices (e.g., Friedland & Alford, 1991). These entwinements have been theorized to produce multiple forms of rationality, and most often congeal around institutional orders related to the market, family, corporation, profession, state, religion, and community (Thornton et al., 2012). Even though a great deal of evidence has accumulated on the existence and effects of logics associated with these orders, these orders are provisional and not meant to be exhaustive. In fact, Friedland and colleagues have recently posited that there may exist institutional logics related to love (Friedland, Mohr, Roose, & Gardinali, 2014), leading Friedland (2021) to notably shift away from the notion of institutional order as we discuss further below.

While scholarship on institutional logics has accumulated at a rapid rate across all the top journals in organization studies (Ocasio, Thornton, & Lounsbury, 2017), a deeper engagement with practice theory could be particularly advantageous (Lounsbury & Wang, 2020; Smets et al., 2017). It is useful to note that two general lines of empirical research on practice and institutional logics exist and provide foundational resources for our project. One line of work derives

inspiration from the work of Bourdieu (e.g., Bourdieu, 1984), building on methods and insights from the new structuralism (e.g., Lounsbury & Ventresca, 2003; Mohr, 1998; Hannigan et al., 2019; Höllerer, Daudigeos, & Jancsary, 2018) to study the evolving relationship of practice and institution in fields. These approaches have carefully attended to how “meaning-centric approaches (in the more traditional, humanistic and interpretive sense of that term) mix with more formalized (measurement based) styles of looking and knowing and understanding cultural forms” (Mohr & Ghaziani, 2014, p. 229). Mohr and Guerra-Pearson (2010), for instance, used a multidimensional scaling analysis of social welfare discourse about social problems and recipients to study how social welfare practices were reorganized at the turn of the 20th century in New York City in response to a shift in institutional logics driven by processes of professionalization and bureaucratization (see also Mohr & Duquette, 1997).

Another line of work has attended to more incisive qualitative accounts, either historically (Lounsbury & Crumley, 2007) or ethnographically (e.g., Quattrone, 2015; Smets, Morris, & Greenwood, 2012) to unpack how the dynamics of practice relate to the reproduction or transformation of logics within which they are embedded. For instance, Quattrone (2015) emphasized the importance of practice in his detailed account of Jesuit accounting by focusing on the ongoing co-production of means and ends. He argued that:

“rationality and institutional logics, and the commensurate numerical and scientific representations, such as accounting and economic calculations, are never a priori, complete, and objective. They are always subject to continuous power struggles and translations.” (Quattrone, 2015, p. 3)

This approach to logics is consistent with more process-based institutional analyses such as those rooted in the German institutionalist notion of *Leitideen* which emphasizes how guiding orientations and practices are always in flux (e.g., Meyer, Jancsary, & Höllerer, 2021).

Yet, much may be gained by forging a stronger conceptualization of practice within institutional analyses. Practice-driven institutionalism (PDI) offers one promising avenue, making a concerted effort to elevate practice as a central tenet of institutional analysis (Smets et al., 2017). It extends previous work advancing institutional analysis by more deeply engaging practice-theoretic concepts and analytic approaches (e.g., Lounsbury, 2007; Lounsbury & Crumley, 2007; Smets, Greenwood, & Lounsbury, 2015; Smets, Jarzabkowski, Burke, & Spee, 2015; Smets et al., 2012). Given the concern that has been expressed about the overly stable, substantive, and reified depictions of logics that exist in the literature (e.g., Ocasio, Maukapf, & Steele, 2016; Quattrone, 2015), we believe that a deeper engagement with practice-theoretic ideas and commitments can enable the development of a much richer constitutive institutional analysis that more deeply melds commitments underlying practice theory and the institutional logics perspective (Lounsbury & Wang, 2020).

Building on principles of practice theory, PDI has the potential to advance this kind of constitutive institutionalism by focusing attention on the collective performance of institutions as grounded in (and therefore inseparable from) the situated, emergent and generative practices that comprise institutions. It places

“the everyday work of practitioners ‘on the ground’ [as] the engine room of social order and the practices by which jobs get done as the driving force” (Smets et al., 2017, p. 2). The emphasis of PDI on “practices” counter-balances an actor-centric approach to institutional theory, for example, evident in cognitive or symbolic emphases within microfoundations (Haack et al., 2020; Hwang & Colyvas, 2021). It may seem that the distinction from actor-centric approaches is somewhat artificial given that a focus on practices draws on empirical analyses of situated activities, accomplished by people and the appropriate materials/equipment (Gherardi, 2019; Nicolini, 2009). But it is important to emphasize that practice scholars make practices the primary focal point, conceptualizing individuals as performers of practices (Reckwitz, 2002). Thus, superficial readings and uses of practice theory that valorize actors tend to undermine the promise and innovative potential of “practice” (stemming from practice theory) by equating practice with a mere focus on mundane or mindless activities.

We believe that this double volume provides a rich array of resources to develop the interface between practice and institution. The papers by Friedland and Schatzki provide masterful provocations – Friedland (2021) revisits his original approach to institutional logics on the basis of Heidegger’s notion of worldhood and Schatzki (2021) offers explanations of institutional orders from his practice-theoretic lens. The multifaceted – and complicated – nature of the practice and institution interface is featured across papers in both volumes. While some contributions are firmly positioned within practice theory with an eye toward advancing institutional analyses (e.g., Nicolini, Reineke, & Ismail, 2021; Pentland, Liu, Kremser, & Haerem, 2021; Seidl, Ohlson, & Whittington, 2021; Zilber et al., 2021), others have retained a stronger footing within the core premises of institutional theory (e.g., Meyer et al., 2021; Steele, Lounsbury, et al., 2021). Gehman (2021) demonstrates the rich potential of this interface by juxtaposing assumptions and concepts of practice theory and organizational institutionalism. Despite similar origins, distinct nuances of practice theory and institutional theory are ever-present. The debate between Friedland and Schatzki exemplifies the challenges or “landmines,” bringing to the fore points of division between institutional theory and practice theory. Rather than glossing over such differences, Zilber et al. (2021) pointedly urges scholars to retain and appreciate the distinct traditions offering vantage points to engaging in institutional analysis.

This double volume also features contributions that illuminate an array of possibilities to advance scholarship on a variety of concepts and themes including institutional change (e.g., Pentland et al., 2021; Schildt, Kodeih, & Tarabichi, 2021; Seidl et al., 2021), legitimation (Gautier, Pache, Chowdhury, & Ligonie, 2021; Nicolini et al., 2021), institutional objects (Friedland & Arjaliès, 2021), values (Gehman, 2021), meaning structures (Meyer et al., 2021) and organizational culture (Wang & Lounsbury, 2021) to name but a few. In doing so, several of these papers elaborate on the promise of a practice-driven institutionalism. For instance, Seidl et al. (2021) extend the conceptual purchase of PDI by introducing “restless practices” to demonstrate how practice can drive change in specific local practices or in wider institutional fields. Schildt et al. (2021) advance PDI by illustrating how the introduction of new practices shaped an institutional field by

creating new experimental spaces that suspended the carriers of established logics and legitimizing institutional innovations. Other papers concentrate on illuminating the wide-ranging potential of practice theory, for instance to explain the process of legitimation on the basis of material arrangements (Nicolini et al., 2021) or communities of practice (Gautier et al., 2021). Pentland et al. (2021) draw on practice theory to advance research on routine dynamics (Feldman, Pentland, D’Adderio, & Lazaric, 2016) and demonstrate the endogenous potential of institutional change.

While most contributions embrace the utility of exploring this juncture, Meyer et al. (2021) express a great deal of skepticism about rushing too quickly toward integration, arguing for a focus on “regionalized zones of meanings” to avoid an over-emphasis on micro-level activities within extant theorizing of institutions. They argue that the: “place of practices in an institutional framework is not straightforward – not least due to the many different and often unclear definitions of ‘practice’ (see, for instance, the different perspectives in Knorr-Cetina, von Savigny, & Schatzki, 2001)” (Meyer et al., 2021, p. 163). Even more provocatively, they opine that: “bringing together two often ill-defined and over-used concepts (i.e., “institution” and “practice”), both with a considerable number of disciples, will certainly enlarge the demand for the size of the tent, but the conversations between the two groups might not exceed small talk at a cocktail reception – a prospect that does not seem overly attractive to us” (p. 181).

While we have a more encouraging view of this overall project, the jury is still out. The very nature of such scholarly innovations and alliances involves a great deal of intellectual risk and exploration. It will not be to everyone’s taste and will likely entail some degree of revision, refinement, and expansion as the connections become more precise and sophisticated with the accumulation of research and discoveries over time.

In what follows, we motivate the foundations of our overall project by providing a brief overview of literatures which emphasize “practice” and “institution” in organization studies, calling attention to exciting opportunities at the interface that have emerged on each sides of the juncture. While not comprehensive – discussions related to practice and institution can be traced back to early scholarship in philosophy, sociology, anthropology, and the like – we sketch its bounds while also drawing attention to more comprehensive reviews for readers less embedded in these traditions. Despite the plurality of its roots, contemporary scholars admittedly tend to anchor on the social theoretic developments associated with Giddens (1984), Bourdieu (1977) and others who sought to develop approaches that, going beyond standard categories of structure and agency, conceptualized society and social life as an ongoing process. This scholarship has mushroomed into a multiplicity of pathways that, while sharing a family resemblance (Wittgenstein, 1953), provide very distinctive ontological approaches to the dynamic study of practices and institutions.

After tracing some key strands of development in both the study of practice and institutions in organizations studies, we provide a more systematic introduction to the contributions across the two volumes. We begin by discussing papers in this volume (71) that showcase several traditions to explore the intersection

of practice and institution in empirical analysis. We then provide an overview of companion volume 70 that focuses more on conceptual foundations, offering several paths to theorize the interface of practice and institution. Overall, we believe that the contributions in this double volume provide robust fodder for the further fleshing out of the research agenda for which we advocate.

“PRACTICE” AND “INSTITUTION” IN ORGANIZATION STUDIES

The Study of Practice in Organization Studies

Practice theory, originating in philosophy, sociology, and anthropology, comprises several theories advocating practice as primacy to individual action or social structure and systems. Schatzki et al. (2001, p. 3) note that “practice approaches promulgate a distinct social ontology: the social is a field of embodied, materially interwoven practices centrally organized around shared practical understandings.” Practice theory represents a distinct approach, but connotes a family of theories mostly associated with the work of Bourdieu, Giddens, and Schatzki, dubbed “general theories of practice” (Sandberg & Tsoukas, 2016). Even though general theories of practice build on philosophical principles advocated by Heidegger and Wittgenstein; Giddens, Bourdieu, and Schatzki anchor their work in slightly different definitions of “practice” (cf., Nicolini, 2011; Nicolini & Monteiro, 2017).

Despite distinct conceptions of “practice” and absence of a unified theory (Schatzki, 2001), practice theorists are largely united in their points of departure, rejecting a substantialist ontology in favor of a social ontology. A substantialist ontology portrays the world as made up of objective, discrete, and independent entities which form “reality.” The relation of independent entities (dualisms) provides the basis of all human knowledge. A substantialist ontology has two dominant strands: individualism and structuralism. The former locates action within the realm of individuals’ freewill, whereas the latter favors explanations of action derived from social structures and systems. Alternatively, practice theory propagates a social ontology, with a world comprised of practices (e.g., a web of practices or a field of practices). In opposition to both strands of a substantialist ontology, the work of Bourdieu (1977) and Giddens (1979, 1984) provide a basis to: “free activity from the determining grasp of objectified social structures and systems, to question individual actions and their status as the building-blocks of social phenomena, and to transcend rigid action-structure oppositions.” (Schatzki, 2001, p. 1). Forging a similar opposition (cf., Schatzki, 2001), Schatzki devoted much of his career to developing a sophisticated and comprehensive theory of the social, anchored in a plenum of practices (e.g., 2002, 2005, 2011, 2019). In brief and simple terms, Schatzki suggests:

social life, or human coexistence (the hanging-together of human lives) inherently transpires as part of... bundles [of practices and material arrangements]...the sum of such bundles marks out the plenum in which all social affairs transpire. (Schatzki, 2011)

Embracing the primacy of practice requires several ontological commitments. For instance, it places little emphasis on individuals, and yet, neither social structure nor systems are emphasized. Instead, individuals are regarded as carriers of practices (Reckwitz, 2002; Schatzki, 2002). Such a view has profound implications requiring further consideration. In his depiction of practice theory within broader social theory, Reckwitz (2002) defined practices as:

a routinized type of behavior which consists of several elements, interconnected to one other: forms of bodily activities, forms of mental activities, “things” and their use, a background knowledge in the form of understanding, know-how, states of emotion and motivational knowledge. (Reckwitz, 2002, p. 249)

As carriers of a practice, people are neither autonomous nor are they the judgmental dopes who conform to norms. They understand the world and themselves, and use know-how and motivational knowledge according to the particular practice. Reckwitz (2002) positions the individual as “the unique crossing point of practices, of bodily-mental routines” (Reckwitz, 2002, p. 256) given the diverse social practices that people carry out. Practice theory also offers a refined conceptualization of materials (Reckwitz, 2002) which are no longer reduced to objective or functional features (cf., Lê & Spee, 2015). Owing to Heidegger’s notion of equipment, objects become as indispensable and equal to know-how to carry out particular social practices.

Within organization studies, practice theory provided the foundation to develop new streams of research; sparking alternative conceptions of strategy (e.g., Chia & Holt, 2006; Jarzabkowski, Balogun, & Seidl, 2007; Whittington, 2006), routines (e.g., Feldman, 2000; Feldman & Pentland, 2003) and information systems (e.g., Leonardi, 2011; Orlikowski, 2000). At a meta-level, such research enterprises have debunked the “existence” of organization in an entitative sense. As a result, organization comes to bear in the many interwoven practices unraveled in studies on strategy, routines, and information systems employing the practice lens. Conceptually, organization is “a” site of social life “composed of a nexus of practices and material arrangements. This means that social life inherently transpires as part of such nexuses” (Schatzki, 2005, p. 471). For Schatzki, sites “are arenas or broader sets of phenomena as part of which something – a building, an institution, an event – exists or occurs” (Schatzki, 2005, p. 468), yet without limiting site to spatial characteristics. Following this line of reasoning, organization – as site – hangs on the thread of practices:

Any practice is an organized, open-ended spatial-temporal manifold of actions. The set of actions that composes a practice is organized by three phenomena: understandings of how to do things, rules, and teleoaffective structure. By rules I mean explicit formulations that prescribe, require, or instruct that such and such be done, said, or the case; a teleoaffective structure is an array of ends, projects, uses (of things), and even emotions that are acceptable or prescribed for participants in the practice. (Schatzki, 2005, pp. 471–472)

With the exception of Bourdieu’s work, Giddens and Schatzki’s work was primarily conceptual, providing scholars with scope to furnish empirical analyses of social phenomena within organization studies. As previously noted, such scope provided the foundation to open several lines of research, exemplified in the