

MACROFOUNDATIONS

RESEARCH IN THE SOCIOLOGY OF ORGANIZATIONS

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RESEARCH IN THE SOCIOLOGY OF
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MACROFOUNDATIONS: EXPLORING THE INSTITUTIONALLY SITUATED NATURE OF ACTIVITY

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SECTION 1

INTRODUCTION

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MACROFOUNDATIONS: EXPLORING THE INSTITUTIONALLY SITUATED NATURE OF ACTIVITY

Christopher W. J. Steele, Timothy R. Hannigan,
Vern L. Glaser, Madeline Toubiana and Joel Gehman

In recent years, institutionalists have devoted increasing attention to the so-called “microfoundations” of institutions: that is, to the everyday activities and dynamics through which institutions are constituted, exert their influence, and decline into obscurity (Haack, Sieweke, & Wessel, 2019; Powell & Colyvas, 2008; Powell & Rerup, 2017). While the value of such work is both substantial and self-evident, several authors have expressed concern that the imagery of “microfoundations” smuggles in an inappropriate ascription of causal primacy to “the micro,” or even to atomistic individuals, and thus casts into shadow some critically important facets of institutions and institutional theory (Boxenbaum, 2019; Hwang & Colyvas, 2019; Jepperson & Meyer, 2011). Most notably, a focus on microfoundations risks obscuring the constitutive and contextualizing powers of institutions (Gehman, Lounsbury, & Greenwood, 2016; Lounsbury & Wang, 2020; Meyer, 2010; Wooten & Hoffman, 2017). Constitutively, institutional arrangements are inscribed into the symbolic frameworks, bodies, emotional registers, and sensory apparatuses through which people experience world and self (Bitektine, Haack, Bothello, & Mair, 2020; Meyer & Vaara, 2020; Toubiana, in press; Voronov & Weber, 2020); as well as being inscribed into the forms and workings of organizations and other social actors (Marquis & Tilcsik, 2013; Meyer, 2010; Tracey, Phillips, & Jarvis, 2011; Waeger & Weber, 2019). Institutional arrangements also play a complex and intricate contextualizing role: furnishing settings, materials, and infrastructures for local episodes of individual, interactional, and organizational cognition, emotion, and action (Creed, Hudson, Okhuysen, & Smith-Crowe, 2014; Hinings,

Logue, & Zietsma, 2017; Lawrence & Graham, 2015; Lounsbury & Glynn, 2019; Ocasio, Thornton, & Lounsbury, 2017; Sadeh & Zilber, 2019; Steele, in press). Both of these themes sit oddly with any explanatory privileging of “the micro” – indeed, at first glance, they would seem to support a precisely inverted prioritization of “the macro.” With such thoughts in mind, the 2018 Alberta Institutions Conference invited participants to articulate the “macrofoundations of institutions”; using this impish terminology (Fine, 1991) in a purposefully provocative call.

For us, the concept of macrofoundations was ultimately intended to be heard in harmonic counterpoint with that of microfoundations: to highlight that “the micro” and “the macro” are always and everywhere entwined in a co-constitutive interplay, in which both have every bit as (patently in)valid a claim to being foundational (Fine, 1991; Meyer & Vaara, 2020; Steele, Toubiana, & Greenwood, 2019).¹ Contributions to the conference seemed to us to intuit, embrace, and embody this spirit. The interest and enthusiasm of the 106 registered participants motivated the present volume – and the 34 presentations provided plenty of material for inclusion! The 11 chapters of this volume, drawn from this rich vein of material, explore and expand upon the broad notion of macrofoundations empirically and theoretically; and we would like to express our gratitude to all the contributors for the work that they did in generating an eclectic yet coherent array of insights into the constitutive and contextualizing powers of institutions. Here, we will briefly introduce the 11 chapters, in their order of appearance. We do so under four headings, which we have used to structure the volume: “definitions and pontifications,” “macrofounding the local,” “localizing the macrofoundational,” and “reflections and future directions.”

DEFINITIONS AND PONTIFICATIONS

In the first chapter of the volume, Steele and Hannigan make an initial exploration of what a macrofoundational agenda might entail, and the opportunities it might offer (Steele & Hannigan, 2021). They first propose focusing attention on the ways in which institutions contextualize local activities, and the ways in which institutions shape the nature of people, objects, and physical spaces. They suggest that exploring these topics should cast light on how institutional arrangements elicit, shape, and – critically – preempt micro-dynamics, on how institutions shape lived experience (and the conditions in which such experiences arise), and on the tectonics of large-scale institutional change. Importantly, they also highlight another idea that should inform any emergent macrofoundational agenda: that macrofoundational forces are implicitly and explicitly negotiated, or refracted, in the course of local happenings. In this sense, they follow Gary Alan Fine in suggesting that there are no clear causal arrows running from the micro to the macro or vice versa, but, rather, an unfolding process of mutual constitution. As they put it (p. 21):

Macrofoundations are not linkages to stable and given entities, which hover above local activities; rather, they are concrete concatenations of activities and states of affairs over multiple sites – specific flows of effects and reactions, which work to pin local activities into place.

Their explorations ultimately lead them to suggest abandoning the imagery of “foundations” entirely, in favor of an alternative “optometric” imagery, which views the micro and macro as lenses; that is, as microscopes and macroscopes. They argue that embracing this imagery would not only encourage further reflexivity regarding the lenses we use as institutionalists – each of which draws some phenomena into focus, at the cost of blurring or blocking out others – but also help to foreground the use of various micro and macro “lenses” by participants in everyday life, as a consequential empirical phenomenon. Thus, they explore the horizons opened up by the idea of macrofoundations, even as they set aside the term.

MACROFOUNDING THE LOCAL

The next section of the volume focuses on the role of institutions in contextualizing the ostensibly “micro”; which is to say, the ways in which institutional arrangements “macrofound” local life. The three chapters flesh out the contextualizing and constitutive powers of institutions, both empirically and theoretically. Thus, [Middleton, Irving, and Wright \(2021\)](#) explore empirically how institutional prescriptions shape and transform the social spaces in which everyday life unfolds – with important consequences for the patterning of local activities. [Biygautane, Micelotta, Gabbioneta, and Cappellaro \(2021\)](#) show empirically how inter-institutional orders can provide a critical context for evolving populations of organizations – shaping local motivations and feasibilities in ways that can preempt the adoption of organizational forms. And [Crawford and Dacin \(2021\)](#) theorize four distinct types of punishment that can characterize institutional arrangements – contextualizing everyday activities through the shadow of punishments present, or potentially-to-be. Beyond the immediate insights that these chapters provide into multiple extant conversations, they also provide a collective justification for further research into the contextualizing and constitutive force of institutions, and a generative set of directions for future work. Below, we introduce them in more detail, in sequence.

In the first chapter of the section, [Middleton et al. \(2021\)](#) explore how institutions exert their influence through the mundane spaces in which everyday life unfolds, through a qualitative study of the emergency department in an Australian hospital. They begin with the premise that everyday life is consequentially contextualized by mundane spaces, such as rooms, corridors, and buildings: as the material design of these spaces, and their prevailing patterns of use, shape the ease and consequences of various lines of action. The authors then argue that such spaces are in turn shaped by institutional arrangements. In their empirical work, they explore how a shift in the institutional context of Australian medical care – reflected in an increased prioritization of time-before-treatment – gave rise to, and took effect through, a change in the design and use of space. Previously, use of a waiting room kept walk-in “emergency” patients away from the treatment area, thus rendering them less visible and reinforcing professionally accepted patterns of prioritization (which gave priority to patients delivered by ambulance). Shifting institutional priorities led to abolition of the waiting room, with all patients being

queued instead in “an internal waiting corridor” by the treatment space. In these circumstances, walk-in patients – and delays in their treatment – were made very visible indeed; enmeshing physicians in a space of surveillance that challenged their old ways of working. The authors abstract from this to argue that spaces can serve institutional arrangements by *hiding* and *revealing*. They also show how spaces provide cues for identity and for institutional policing (*reminding* people of their responsibilities), and how they offer possibilities for the physical exclusion of disruptive actors (*containing* resistance). The first chapter of this section thus shows how institutions shape the mundane spaces that contextualize everyday life; providing the macrofoundations not only for local activities, but also for one of the most immediate and concrete contexts of such activity.

In the next chapter, [Biygautane et al. \(2021\)](#) begin with the observation that institutional theorizing has generally privileged western conceptions of institutional orders, neglecting the distinctive workings of institutional orders in non-western cultures. To illustrate this, they argue that the tribal system in Qatar anchors the inter-institutional system in that setting and has given rise to distinctive institutional orders of state, market, and family. The authors then show how these institutional orders in Qatar, as a macro-institutional context, have consequentially shaped the adoption and implementation of a Western organizational form – in the form of public–private partnerships (e.g., long-term contracts between government actors and private actors, based on a delegation of responsibilities for the construction, ownership, and management of an infrastructure project). For example, their study shows how the role of the ruling family in government mitigated the very need for public–private partnerships by fusing the public and private sectors, and by prioritizing the needs of certain interest groups in a manner that reduced the benefits that might accrue from public–private partnerships. Additionally, the authors point to the ways in which the tribally influenced role of the state, the lack of market norms of competition in Qatar, and the uncertainty foreign investors faced in their interactions with the ruling family, collectively led to public–private partnerships *creating* inefficiencies – the exact opposite of what might be expected in a western context (optimistically speaking). The chapter thus “reveal[s] the importance of considering the culturally-contingent nature of institutional orders in examinations of countries that are particularly distant from the Anglo-Saxon tradition”; both as an end in itself, and as a means of better understanding more localized or specific dynamics, in those contexts.

In the third chapter of the section, [Crawford and Dacin \(2021\)](#) draw our attention to the macrofoundational by exploring the distinct types and patterns of punishment that can uphold institutional arrangements. Building on the premise that “one way that institutions exercise their constitutive power is by punishing wrongdoers or those who violate the integrity of the institution (beliefs, norms, structures and practices),” they introduce four distinct types of punishment, which vary in their visibility and formalization. While the first type of punishment, retribution, is the formalized and visible type most often explored in the literature (i.e., sanctions, fines, and incarceration), the authors argue that the three other types – punishment-as-charivari, punishment-as-rehabilitation, and punishment-as-vigilantism – though less explored, are equally important. They draw our attention to

the shaming efforts which are part of punishment-as-charivari, to restoration and forgiveness as part of punishment-as-rehabilitation, and to intense violence as the core mechanism of punishment-as-vigilantism. In the process, they highlight the multimodal nature of punishment, and the role of emotions, the material and the symbolic in defining both punishment and response. Crawford and Dacin thus cast light on another way in which institutions macrofound local activities: by inspiring and intertwining with distinctive regimes of punishment, which contextualize everyday life. In addition, they also illuminate the recursive relationship between the micro and the macro. In both punishment-as-charivari and punishment-as-vigilantism, for example, people who are emotionally invested in institutions seek to publicly shame or to hurt others in order to uphold those institutions. Institutional arrangements and patterns of punishment thus contextualize local efforts to reinforce and defend institutions; with micro and macro unfolding in a co-constitutive interplay. In closing, the authors critique institutional researchers for ignoring some of the most harmful ways institutions can operate – through violence – and ask readers to take seriously the role of violence as they further explore the macrofoundational agenda.

LOCALIZING THE MACROFOUNDATIONAL

This discussion of the inseparability of micro and macro neatly sets the scene for the third section of the volume. Here, we emphasize a second element of the “macrofoundational agenda” as we see it: that macrofoundations are themselves locally negotiated in part, and are matters of implicit and explicit local concern as local happenings unfold. This opposition to the analytic partitioning of the macro and micro is a critically important idea behind the macrofoundational challenge first posed by Gary Alan Fine, and a key part of the spirit of the volume. The three chapters in this section explore empirically how local understandings of institutional arrangements and their impacts play into local activities – and how these local activities, through their concatenations and reverberations, constitute and reconstitute the macro-context over time. First, [Brüggemann, Kroezen, and Tracey \(2021\)](#) explore how the felt encroachment of dominant institutional logics can inspire efforts at resistance; efforts that may not only preserve marginalized logics, but also drive their refinement, elaboration, and evolution. In the second chapter, [Hannigan and Casasnovas \(2021\)](#) explore the interplay of micro and macro in emerging fields: how field-configuring events, captured by media reports, serve as provisional portraits of the field that contextualize further events; providing a kind of “bootstrapping” process of field emergence. In the final chapter of the section, [Meyer, Kornberger, and Höllerer \(2021\)](#) explore how local efforts to understand and change a complex configuration of institutional arrangements – in their case, the city of Sydney – helped to constitute a distinctive thought style, associated with a reformulated “public” of participants and audiences; essentially providing “the city” with a new infrastructure for ongoing self-reflection or thought. All three chapters give a sense of the recursive or

co-constitutive relationship between “the macro” and “the micro,” as we unpack in more detail below.

Brüggemann et al. (2021) observe that existing research has not considered what happens to marginalized logics in fields with a dominant logic. By exploring the empirical case of the UK trade publishing industry, they cast light on the ways in which field actors’ active resistance to dominant logics can not only preserve marginalized logics, but also fuel their elaboration and evolution; thus driving ongoing change in institutional arrangements. More specifically, they show how the evolution of a marginalized editorial logic in publishing occurred along three generative paths, as actors resisted the dominant market logic: *preservation*, in which conformity to the marginalized logic was used as a special marker of reputation and prestige by high-status publishing houses; *purification*, in which the editorial logic was articulated in contradistinction to the market logic, emphasizing and elaborating the merits of a more vocational approach to publishing; and *radicalization*, where the editorial logic of publishing became increasingly bound up with other interests and concerns that were marginalized by the market logic. Together these efforts to navigate a macrofoundational context have led to the refinement and evolution of the marginalized editorial logic; which continues to spread, and transform that context in turn. As a multimethod study combining interviews, participant observation, and archival data over several years, the chapter provides a rich historical account of activity in the periphery of a field: illuminating the active institutional work around “logics that are seemingly left behind in the wake of a shift toward a new dominant logic” (p. 124), and its consequential nature. This contributes to recent calls to better understand the dynamics of intra-logic evolution, and the historical contingencies of logics; uncovering distinct patterns of institutional change. This chapter thus explores how institutions contextualize local activities, while also casting light on how these contextualizations are localized – becoming the felt and understood context for local actions and acts of resistance – and how local actions shape logic and field evolution.

In the following chapter, Hannigan and Casasnovas (2021) take up this same theme of the recursivity between the micro and the macro. They explore how early moments of field emergence both structure and are structured by provisional understandings of the field as a macro-context. Through a multimethod empirical study combining topic modeling and qualitative field methods, they track early activity of the impact investing field in the UK. They use the metaphor of a camera obscura to show how traces of key moments are partially captured by the media, and turned into provisional pictures of the field that inform later moments. In a context full of ambiguity and complexity, these provisional pictures and their elements serve as macrofoundational cues, which affect how actors in this field come to understand and develop their relative positioning. Field-configuring events – as moments of intense interaction – play a particularly important role in shaping these provisional portraits of the field, and thus help reconfigure the ways in which actors are meaningfully arranged and interrelated. This study thus helps us begin to theorize the emergence of early institutional infrastructures (Zietsma et al., 2017). Importantly, for our purposes, the authors highlight recursivity between micro and macro: how key (micro) events or “moments,” captured in