

# СОЦІОЛОГІЧНІ НАУКИ

UDC 330.101.2

## WELCOME TO THE MACHINE: A CONSTRUCTIONIST PERSPECTIVE ON INSTITUTIONAL DIFFUSION MODEL

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Prevailing institutional approaches and models of diffusion tend to neglect social constructionist arguments of institutional construction of economic interests and the very notion of rationality. Distinguishing between economic and social motives for adoption, most institutionalists still offer somewhat undersocialized accounts of organizational processes and agency. This essay makes an attempt to clarify and reintegrate phenomenological arguments into institutional diffusion model, revisiting, in particular, an embeddedness of early adopters' economic behavior and interests.

**Keywords:** institutional theory, diffusion, adoption, phenomenology, social construction.

*«It's alright, we told you what to dream»  
(Pink Floyd, 1975)*

**Introduction.** Institutional perspective on adoption and diffusion of management and administrative practices is one of the most comprehensive and well documented research programs under the banner of institutional theory as well as across a broader literature on innovations diffusion and organizational studies. Much of the research in this space tends to distinguish and contrast early adoptions against later ones. This is made by identifying motives and drivers of implementation, disentangling economic rationales and legitimacy concerns. The central argument of this essay is that what at the first glance is claimed and observed as an economic- and interest-driven behavior, appears to be socially constructed understandings and shared meanings, even though the very adopters would claim their motives to be strictly economically rational and efficiency-seeking. It is unreasonable to distinguish economic and social forces since first is a definition constructed and manifested by wider socio-cultural context (Jepperson, 2002; Friedland and Alford, 1991; Scott, 1987; Suddaby and Greenwood, 2009) [2] [3] [4] [5]. This means that those individuals' understandings and definitions of economic and efficiency gains are constructed by an institutional environment in which they operate. As a result, individuals perceive socially constructed information and image of certain management concepts and economic tasks organizations should reach via these concepts (Zucker, 1977) [6]. Shared understandings and assessments of the same economic and management elements are elaborated on the basis of circulating stories instead of hard facts. Modern management techniques, concepts and models achieve widespread dissemination on the basis of «rational myths» or success stories, which in the lack or absence of clear economic outcomes and financial returns from these innovations push organizations to adopt innovations they can't directly assess against empirical information and calculation (Abrahamson and Rosenkopf, 1993) [7]. In doing so, they ground their decisions not so much

on the information on innovation's efficiency and returns but on the others decisions.

**Recent developments in institutional literature on diffusion.** The present section briefly reviews central statements of organizational institutionalism and its application in diffusion studies, starting from classical pieces by Selznick, Meyer, Rowan, Scott, DiMaggio, Powell and Zucker and further elaborations by Zbaracki, Zilber, Kennedy, Fiss, Lounsbury, Modell and others. Next sections highlight and discuss more recent contributions and reassessments of institutional arguments, arguing for social constructionist approach to institutional diffusion model instead of rational-institutional dichotomy.

As an alternative perspective to traditional economic theories of rational choice, new institutional sociology aimed to explain various anomalies in organizational behavior and decision-making that couldn't be explained by traditional organizational theories. Initial questions formulated in pioneer studies asked why organizations tend to imitate prevailing practices and structures even though these adoptions can make little or no economic value (Granlund and Lukka, 1998; Staw and Epstein, 2000) [8] [9]. According to institutional explanations, instead of being concerned solely with economic benefits and efficiency improvement, organizations also operate in socially constructed environments where taken-for-granted rules, norms, beliefs and values define which actions and behaviors are appropriate, rational and modern (Meyer and Rowan, 1977; Scott, 2008) [10] [11]. These rational myths arise from subjective meanings and acquire objective status of social fact. When perceiving the myth, organizations don't rely on rational analysis based on updated information and don't evaluate or question the truthfulness and reliability of institutionalized elements (Jepperson, 2002) [2]. That is, «*the effects of myths inhere, not in the fact that individuals believe them, but in the fact that they «know» everyone else does, and thus that «for all practical purposes» the myths are true*» [12:75]. Meyer and Rowan (1977) argued that by conforming to these institutional scripts, organizations depict themselves as legitimate, increasing their survival chances and access to scarce re-

sources [10]. A dissemination of myths is especially likely under conditions of uncertainty (March and Olsen, 1976) [13], when managers find themselves with the limited information and unclear performance goals and ways these goals to be achieved (Abrahamson, 1991; Wijen, 2014) [14] [15]. In an information vacuum, where no individual assessments of innovations' returns can be made, they are more prone to look what other do and to model themselves after other organizations they perceive as more successful, legitimate and prestigious (Galaskiewicz and Wasserman, 1989; Abrahamson and Rosenkopf, 1993) [16] [7]. They either believe that the course of actions undertaken by other organizations are rational and optimal one and, therefore want to achieve the same economic benefits or/and the same social status or don't believe but imitate them in order to at least achieve legitimacy. Latest is the most prevailing line of inquiry in institutional literature. Despite a centrality of a social construction of economic interests and institutional definitions of rationality, the most common impression derived from institutional studies is that organizations are aware of institutional norms, values and prescriptions, they intentionally conform to those practices that promise them to bring legitimacy and access to resources, while strategically decoupling these institutionalized elements from actual activities. Above described two-stage model and most research built upon these dichotomy of economic and social interest by definition imply that at least early adopters are free from «iron cage» and rationally chose best and optimal practices and structures from their environment. Similarly, later adopters evaluate different strategies and decide to copy prevailing practices as they may assess social benefits as more valuable than those of economic quality. It is not evident from these studies whether authors acknowledge the institutional nature of these economic interests as it is not specified. Probably, when referring to early adopters' motives to solve specific organizational problems and improve performance and to later adopters' interests in social position improvement though conformity and imitation, it is meant that both types of interest are institutionally inspired. Or maybe not. In the light of the rising at that times concerns regarding the necessity of «*injecting an appropriate amount of agency into accounts of organizational behavior*» [17:562] this strategic perspective, popularized mostly by Oliver and Suchman in 1990s and a range of scholars in 2000s when a research program on institutional entrepreneurship reached the top of its popularity moved institutional research somewhat away from social constructionist arguments of early institutional literature.

**Two-stage model of diffusion.** One of the central claims of institutional theory is that organizations can make more or less rational and efficiency-driven choices in the early stage of field development, while later adopters incorporate already legitimated practices for social considerations, aiming to improve or maintain social position. Those who seek for economic problem solving are expected to be the first to adopt. When a threshold is reached, this early minority «*fuel institutional isomorphic processes by prompting legitimacy concerns among remaining non*

*adopters*» [18:371], pushing an entire field towards greater conformity and, thus, homogeneity and stability. This two-stage model has been widely utilized by institutionalists, who used to explain early adoption by desire of economic gains and late adoption as reflections of mature institutionalized organizational fields when norms of rationality and appropriateness are already defined by institutions (Tolbert and Zucker, 1983; Westphal et al., 1997) [18] [19]. This model was however reconsidered and refined later on, when researchers began to question the validity of arguments behind this conceptualization (Kennedy and Fiss, 2009; Ax and Greve, 2016) [20] [21].

Recently this dichotomy of economic versus institutional motivation has been questioned and fundamentally revisited by researchers who were not convinced by quantitative macro-level observations and structure counts (Suddaby and Greenwood, 2009). Haunshild and Chandler (2008) argued that what is seen as mimetic adoption and imitation behavior may be in fact explained as learning from experience of others, minimizing trial-error costs. Greenwood et al., (2008) distinguished between institutional effects and vicarious learning, suggesting that former can be reported only in case when organization copy others in search for legitimacy and field position improvement. But when they imitate peers because believe that adoption leads to economic benefits and performance improvement, then their choices can be interpreted as acts of rational decision making. Similarly, researchers frequently fail to provide more or less direct evidences of institutional effects, demonstrating rather the absence of economic explanations or claiming for coercive, normative or mimetic processes in situations where adoptions could have been explained as easily by rational considerations (Staw and Epstein, 2000; Scott, 2008).

**Interplay between efficiency and legitimacy.** Institutional theory is widely used to be understood as a theory of legitimacy-seeking accounts, when organizations benefit when intentionally demonstrating their move towards conformity and heterogeneity and that is what has been empirically demonstrated by several studies, although not without doubt (Davis, 2010) [24]. It is, however, one of the most challenging tasks in institutional research which refers to finding blurred boundaries between mimetic behavior and strategic search for new knowledge and learning efforts. Once organizations copy other firms, it doesn't necessary mean that it was for legitimacy gains. It may be so, that organization wants to improve its social position, be perceived as a competitive and modern in the eyes of customers and other stakeholders, but unless it's proved that no or too limited amount of rational considerations, calculations and information regarding innovation's returns, financial and organizational risks and opportunities were proceeded, a case of vicarious learning can't be discarded. It is not, therefore, precluded that organization seeking legitimacy can't benefit from adoption in economic and technical terms, when, for example, «*innovation that makes an organization appear innovative or ethical, for instance, may help it either to raise capital from other organizations or to attract customers*» [14:608]. A symbolic value can directly lead to increase in material returns and

performance improvement, for instance, if that's what Meyer and Rowan (1977) meant by «access to resources». The main difference between these two social processes is the way adopters perceive a practice. It makes sense talking about mimetic and normative processes when organizations perceive particular practices as social fact and the way things are done, thus, observing others and concluding those practices to be legitimate, most obvious, rational and appropriate way of conducting (Jepperson, 2002). By incorporating institutionalized elements from their organizational field, adopters consider «*proper, adequate, rational, and necessary, organizations must incorporate them to avoid illegitimacy*» (Meyer and Rowan, 1977:345) [10], and to maintain or increase legitimacy benefits when assembling institutional practices from other environments. In later cases they also should accompany such adoption by theorizing their actions and behavior. Additional explanation for imitative behavior is also comes from fashion theory, which assumes that individuals and organizations follow fashions in order to simultaneously differentiate themselves from low-status organizations and to become similar to more prestigious peers. Due to the major efforts of business media, consultants, gurus and other players in fashion-setting arena, who use various «rhetoric strategies of legitimacy» and disseminate success stories, practices like Balanced Scorecard now enjoy their status of taken-for-granted and rational way of managing an organization. An institutionalization of these performance measurement systems therefore creates pressures on managers who are expected to manage rationally, which also implies adopting popular concepts and techniques (Kieser, 1997; Staw and Epstein, 2000) [25].

After all, legitimacy gains should be considered as a by-effect of conforming behavior, when actors adopt certain elements not because they clearly access the benefits and rewards for conformity and sanctioned in case of deviation, but because they perceive this institutional myth as a natural and rational way of conduct (e.g. Greenwood et al., 2008). Instead, for example, in accounting research New Institutional Sociology is used in a rather constrained manner. Usually, scholars adopt either Oliver's strategic responses framework or institutional entrepreneurship line of argumentation, theorizing how actors strategically manipulate institutional pressures and alter existing institutions. Among isomorphic forces, coercive pressures are the most utilized. Furthermore, actors strategically and pragmatically decouple institutional elements from day-to-day practices, as if they were aware of institutional demands and field-level pressures. These and other limitations (such as above mentioned structure-counting as an evidence of isomorphic and normative processes) distort core institutional arguments, based on phenomenological statements.

**Social construction of economic arguments.** Strong social constructivist versions of institutional theory go further than traditional institutional studies of diffusion and adoption of practices (e.g. Zucker, 1977; Meyer and Rowan, 1977; Scott, 1987; Friedland and Alford, 1991; Jepperson, 2002). Instead of separating in time economic and social motives and distinguishing between

«technical» and «institutional» environments, these arguments suggest that «organizations may be interest driven, although interests tend to be socially or institutionally defined» (Oliver, 1991:149) [26], thus being shaped by prevailing institutional logic which define a particular course of actions as the only rational, obvious and appropriate (Friedland and Alford, 1991). There are no clear assumptions about economic and industrial efficiency; corporate strategies and macro-economic policies vary from nation to nation (Dobbin, 1994). These dramatic changes reflect not so much shifts in economic development but reflect changes in cultural expectations, norms, values and meanings allowing policy-making to be shaped by national traditions and ideologies. As Suddaby (2015) states, «organizations exist in social contexts in which the rules of appropriate behavior are defined, not by economic rationality, but rather by prevailing myths of appropriate conduct that become so cognitively embedded that they influence managerial assumptions of efficiency and rationality» (2015:1) [28]. In this case, individuals and organizations are not able anymore to recognize their own interests and calculate their optimal decisions and outcomes of their choices. Jepperson, citing Dobbin (1994) reminds that «[t]he economic environment, far from being generic or natural, is partly constituted and re-constituted by public policies and ideologies» and subsequently «public policies alter the ground rules of economic life» (2002:236) [2]. For certain practice to be adopted by a large number of organizations, it is not a matter of efficiency or organizations personal evaluations and attitudes of its efficiency but whether organizations see and encounter other adoptions and get inspired by rational myths related to these practices. «Myths are stories that infuse meaning and value into objective acts, in everyday life and organizational contexts» (Schultz, Suddaby and Cornelissen, 2014:15) [29]. Being repetitively told in numerous sources, over time they become widely accepted and acquire a status of social fact and objective reality, usually without rational analysis and data processing, involving «believing rather than knowing» (Mellemyk, Monsen, Olson, 1988:112; Jönsson and Lundin, 1976; Bergevärn and Olson, 1987) [30] [31] [32]. Adopters look around and consider not so much the quality of the practice but the quality or the number of adopters. Such a behavior fits bandwagon and status-driven categories of imitation modes, when vicarious learning refers to more careful and skeptic attitude towards myths, which is rarely the case. Again, as the central argument of early institutional theory states that «the rules of appropriate behavior are defined, not by economic rationality, but rather by prevailing myths of appropriate conduct that become so cognitively embedded that they influence managerial assumptions of efficiency and rationality» it appears that «our definition of technical efficiency is really a product of culture» (Suddaby and Greenwood, 2009:181) [5]. The problem with a mythical approach to management practices is that «the criteria for knowledge are rooted in faith that is flexible and detached from the phenomena and, as a result, progress becomes very problematic» (Nørreklit et al., 2012) [33].

The closest to social constructionist perspective on agency and decision-making is the concept of institutional logics – a notion that best captures phenomenological nature of institutional processes and clearly sees actions, behavior and beliefs as shaped by wider socio-cultural scripts and shared means. Being largely neglected during 1990s, this theoretical program has been revisited by Thornton and Ocasio in 1999 and since then has occupied a central place in institutional analysis (see Greenwood, Raynard, Kodeih, Micelotta and Lounsbury, 2011 for a review). Institutional logics are «socially shared, deeply held assumptions and values that form a framework for reasoning, provide criteria for legitimacy, and help organize time and space» (Dunn and Jones, 2010:114) [34] [35], therefore, «provide meaning to their [actors] social reality» (Thornton and Ocasio, 2008:804) [36]. It is a kind of social scripts that identify what constitutes rational and appropriate goals and expectation and what is interest-based behavior in a given institutional environment (McPherson and Sauder, 2013; York, Hargrave & Pacheco, 2015; Svenningsen, Boxenbaum and Ravasi, 2016) [37] [38] [39]. Developing this line of reasoning, Lok (2010) draws on Friedland and Alford's (1991) statements about symbolic and material aspects of institutional logics and subsequently argues that «institutional logics provide social actors with vocabularies of motives and senses of self» and therefore, «not only direct what social actors want (interests) and how they are to proceed (guidelines for action), but also who or what they are (identity)» (Lok, 2010:1308) [40]. The notion and conceptualization of institutional logic itself is, probably, the best capturing of phenomenological roots of institutional explanations and social constructed nature of institutions, apart from sanctions, reward-system and strategic action and awareness of actors. This is important emphasis especially in terms of motivations for adoption. Unless research doesn't move towards conceptualizing conscious interest, strategic manipulation, recombination and choice among divergent logics, this perspective suits well with a cognitive patterns of institutions and how actors perceive and experience institutionalized environments.

Consider for example an average adopter of a novel management concept. Like in most empirical studies which examine adoption and implementation of Balanced Scorecards, ABC or any other performance management systems, adopters are depicted as either rational actors who adopt innovations solely for rational purpose, or rational actors under coercive pressures. In this thought experiment it is assumed that some organization decides to adopt novel practice which has been absent in its home institutional environment before. Research stream that follows traditional institutional diffusion arguments will consider this decision as a rational solution, although illegitimate in terms of prevailing values and norms which implies some kind of costs for non-conformity. This one and further pioneer adoptions mark rational choice and pragmatic behavior which creates legitimacy for a novel practice (Tolbert and Zucker, 1983) and later adopters will adopt because of the fear of losing this legitimacy or desire to maintain or achieve it, thus demonstrating an act of strategic isomorphism.

In recent versions of institutional diffusion model, early adopters will be *interested* also in social benefits (for example, becoming a market leader), while later adopters would also like joining economic benefits as well (Kennedy and Fiss, 2009).

Modern management techniques provide organizations with «*useful information for economic decision making to maximise the achievement of organisational goals*» (Hoque and Adams, 2011:311) [41]. Managers may be interested in better performance measurement, strategy implementation, appropriate control systems, more accurate cost management, or customer satisfaction. It is not expected that they can blindly follow recent trends and fashions or adopt practices symbolically. When asking about the reasons for adoption, it is expected that all adopters will respond identically, because, obviously, all decisions are made to improve economic positions. But in the absence of detailed empirical support, these modern techniques are rather considered as myths (Modell, 2004) [42], when reason for adoption reflects socially constructed understandings and shared beliefs about these concepts and decisions are made on the basis of other adoption instead of information on innovations' real return and efficiency (Abrahamson and Rosenkopf, 1993). Rather than relying on any quantifiable and measurable empirical data on innovation's returns and features, managers tend to rely on their belief systems (Westphal, Gulati and Shortell, 1997; Zbaracki, 1998; Staw and Epstein, 2000; Järvinen, 2006) [43] [44] when matching information and, therefore, become more sensible to rational myths, consuming those tools that reduce uncertainty and solve organizational problems (Aksom, 2016). Consequently, it is crucial to understand how managers came into contact with innovation, where do they draw information on it and how do they interpret available information.

Institutional research rarely examines what happens to practices after adoption, stopping at the interorganizational level of analysis (Zeitl, Mittal and McAulay, 1999; Røvik, 2016) [46] [47]. In those cases where the outcomes of adoption are mentioned, analysis is limited to binary options: «adoption» or «non-adoption» (Zbaracki, 1998; Suddaby and Greenwood, 2009). From the very notion of rationalized myths it doesn't follow that it might be decoupled from action, once organization adopt it (Tolbert and Zucker, 1996; Modell, 2004). Myths may be separated from actual activities only in cases when organization fails to adopt new practice despite its best efforts. In other ways, it means that organizations are not embedded in a network of shared beliefs about different practices but strategically chose from different legitimate options they definitely know not to be efficient. If organizations intentionally adopt certain practice ceremonially, then they don't adopt rational myth, pretending that they share these shred meanings about efficiency (Aksom, 2016). Myths are not means of strategic manipulation of legitimacy but an acceptance of certain institutional logic, a belief that a certain technique constitutes a solution to some kind of problems, irrespective to whether it does or not in reality. In any other cases, we talk solely about coercive pressures.

**Conclusions.** Strategic perspectives on practices adoption made it difficult to distinguish be-

tween institutional explanations and other processes that may explain diffusion and adoption equally successfully. Minimizing the phenomenological underpinnings of institutions in favor of more critical realist assumptions, leads researchers to less realistic pictures, similar to economic theories. Previously separated motives for adoption and assumption about adopters' rationality and strategic and manipulative capacity towards institutional pressures takes us away from shared understandings, beliefs and meanings, and makes it difficult to capture real motives and meanings actors perceive while being embedded in the environment where these meanings are already constructed, provided and acted upon.

This paper offered a more constructivist understanding of diffusion and adoption. Not only

institutionalized ones but also those practices that share little success still spread via rationalized myths about them and both early and later adopters are sensible to success stories and shared understandings, especially when empirical data on innovation's returns are not available or ambiguous, organizations tend to rely on these myths, mimicking those that «*it thinks are particularly successful*» and will try what «*others have done and have found to work*» (Galaskiewicz and Wasserman, 1989:473-476) [16]. This fundamental and inevitable shift towards socially shared accounts appears more powerful than a trust in hard facts and numbers; rationalized myths over time replace technical reality of practices and «*infuse them with value beyond the technical requirements of the task at hand*» (Selznick, 1957: 17) [48].

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## ІНСТИТУЦІЙНА МОДЕЛЬ ДИФУЗІЇ ОРГАНІЗАЦІЙНИХ ПРАКТИК З ТОЧКИ ЗОРУ СОЦІАЛЬНОГО КОНСТРУКТИВІЗМУ І ФЕНОМЕНОЛОГІЇ

### Анотація

Традиційні моделі і підходи до пояснення процесу дифузії, базовані на онтології критичного реалізму, не беруть до уваги аргументацію конструктивістів щодо концептуалізації економічних мотивів і раціональності як продукту соціальної конструкції. Розрізняючи емпірично соціальні та економічні мотиви впровадження практик, організаційні інституціоналісти пропонують дещо спрощені пояснення організаційних процесів. В даній статті аргументи феноменології та конструктивізму реінтегровано в інституційну модель дифузії, переглянувши, таким чином, соціальну природу економічних мотивів ранніх імплементаторів.

**Ключові слова:** інституційна теорія організацій, дифузія, впровадження, феноменологія, конструктивізм.

**Аксѡм Г.И.**

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## ИНСТИТУЦИОНАЛЬНАЯ МОДЕЛЬ ДИФУЗИИ ОРГАНИЗАЦИОННЫХ ПРАКТИК С ТОЧКИ ЗРЕНИЯ СОЦИАЛЬНОГО КОНСТРУКТИВИЗМА И ФЕНОМЕНОЛОГИИ

### Аннотация

Традиционные модели и подходы к объяснению процесса диффузии, основанные на онтологии критического реализма, не учитывают аргументацию конструктивистов касательно концептуализации экономических мотивов и рациональности как продукта социальной конструкции. Эмпирически разделяя социальные и экономические мотивы внедрения практик, организационные институционалисты предлагают несколько упрощенные объяснения организационных процессов. В данной статье аргументы и центральные утверждения феноменологии и конструктивизма реинтегрированы в институциональную модель диффузии, пересматривая, таким образом, социальную природу экономических мотивов ранних имплементаторов.

**Ключевые слова:** институциональная теория организаций, диффузия, внедрение, феноменология, конструктивизм.