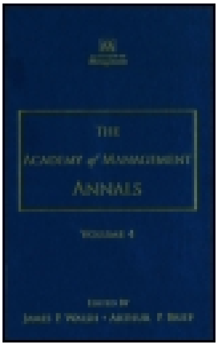

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2 How Actors Change Institutions: Towards a Theory of Institutional Entrepreneurship

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How Actors Change Institutions:
Towards a Theory of Institutional Entrepreneurship

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Abstract

As well as review the literature on the notion of institutional entrepreneurship introduced by Paul DiMaggio in 1988, we propose a model of the process of institutional entrepreneurship. We first present theoretical and definitional issues associated with the concept and propose a conceptual account of institutional entrepreneurship that helps to accommodate them. We then present the different phases of the process of institutional entrepreneurship from the emergence of institutional entrepreneurs to their implementation of change. Finally, we highlight future directions for research on institutional entrepreneurship,

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and conclude with a discussion of its role in strengthening institutional theory as well as, more broadly, the field of organization studies.

Introduction

With most countries facing a major financial and economic crisis, the question of how to reform existing institutions has assumed greater urgency. The demand for institutional change is increasing among organization members and citizens the world over. Efforts to change them, however, face institutions' strong power of inertia. Recognizing that institutional change is a complex process involving different types of forces and agents, we argue that it is our responsibility as scholars to explain not only how institutions influence actors' behavior, but also how these actors might, in turn, influence, and possibly change, institutions. Actors who initiate changes that contribute to transforming existing, or creating new, institutions have been termed institutional entrepreneurs by DiMaggio, who introduced the notion in 1988. This paper examines the process of institutional entrepreneurship. As well as review the literature, we propose a model that considers the process of institutional entrepreneurship from the emergence of institutional entrepreneurs to the implementation and possible institutionalization of the changes they initiate.

Building on Eisenstadt (1980), DiMaggio (1988) introduced the notion of institutional entrepreneurship in institutional analysis in an effort to explain how actors can contribute to changing institutions despite pressures towards stasis (Holm, 1995; Seo & Creed, 2002), thereby reintroducing actors' agency to institutional analysis. Whereas early institutional studies (Selznick, 1949, 1957) did account for actors' agency, later studies tended to overlook the role of actors in institutional change, focusing instead on the influence of exogenous shocks. The notion of institutional entrepreneurship thus emerged as a new avenue of research into endogenous explanations of institutional change. The literature on institutional entrepreneurship subsequently grew exponentially. The more than 60 book chapters and articles on the subject published in peer reviewed journals in North America and Europe over the past decade, including the first mapping of the field of institutional entrepreneurship (Hardy & Maguire, 2008), testify to the literature's rise in institutional analysis as a central stream of research. Whereas early institutional studies considered mainly the constraints under which actors operate and other effects of institutions on actors, works on institutional entrepreneurship aimed to build a theory of action. DiMaggio and Powell (1991) explicitly called for the development of such a coherent theory of action, the lack of which was institutional theory's core weakness. When it came to explaining change, the role of actors and action in the creation, diffusion, and stabilization of institutions was unclear (Christensen, Karnøe, Pedersen, & Dobbin, 1997; Dacin, Goodstein, & Scott, 2002). The challenge was thus to develop a theory of action that, albeit based on the tenets of institutional theory (Fligstein, 1997, p. 397), would avoid the notion of individuals as over-socialized and slavishly devoted to the reproduction of habits (Powell & Colyvas, 2008).

The principle remaining obstacle to the introduction of agency to institutional theory is the "paradox of embedded agency" (Holm, 1995; Seo & Creed, 2002), which refers to the tension between institutional determinism and agency. If our norms and collective beliefs are institutionally determined, how can human agency be a factor in institutional change? Research on institutional entrepreneurship has consequently been criticized for being over-voluntaristic, that is, for ignoring the influence of institutional pressures on actors' behaviors that is the very essence of institutional theory. The criticism pertains to the portrayal of institutional entrepreneurs as a particular "species" of overly rational and disembedded agents (Meyer, 2006, p. 732) who behave as "heroes". Following this line of reasoning, the notion of institutional entrepreneurship would have been presented as a "Deus Ex Machina" (Delmestri, 2006, p. 1536–1537) that unskillfully reintroduced actors to institutional change. Such a simplistic introduction of agency into institutional theory would have undermined the efforts made in the 1980s and 1990s to refine institutional theory into a powerful alternative to the multitude of agency-focused theories that dominated organizational analysis.

Acknowledging the risk of reverting to accounts of heroism and limitless human agency, we nevertheless argue that the concept of institutional entrepreneurship should be central to future developments of institutional theory because it enables us to explore actors' degrees of agency, however institutionally embedded human agency might be. The present paper proposes a model of the process of institutional entrepreneurship that builds on a comprehensive review of the institutional entrepreneurship literature.[1] Our aim is to strengthen the theoretical foundation of institutional entrepreneurship and thereby help to develop a theory of action that accounts for actors' embeddedness in their institutional environment. We first address definitional and theoretical issues associated with the concept of institutional entrepreneurship. We propose a conceptual account that views institutional entrepreneurs as change agents who initiate divergent changes, that is, changes that break the institutional status quo in a field of activity and thereby possibly contribute to transforming existing institutions or creating new ones.

We derive from this conceptual account different phases of the process of institutional entrepreneurship. Identifying the factors that enable the emergence of institutional entrepreneurship despite institutional pressures towards stasis is the first step towards setting up a theoretical foundation for institutional entrepreneurship. We distinguish two key categories of enabling conditions, namely, field characteristics and actors' social position. We then present the key activities in which institutional entrepreneurs engage when implementing divergent change including the articulation of a vision of change and the mobilization of allies to support the vision. We highlight the specific challenges institutional entrepreneurs face relative to other change agents with respect to developing, and mobilizing support for, a vision of change. Because they initiate divergent changes, that is, changes that break with existing institutions, institutional entrepreneurs face specific challenges arising from other actors' institutional embeddedness and possible political opposition. Finally, we present emerging avenues of research on institutional entrepreneurship, and argue that they will have important theoretical as well as practical implications not only in the field of institutional theory, but also, more broadly, in the field of organization theory.

Definitional and Theoretical Issues

The Concept of the Institutional Entrepreneur

Institutional entrepreneurs are actors who leverage resources to create new or transform existing institutions (DiMaggio, 1988; Garud, Hardy, & Maguire, 2007; Maguire, Hardy, & Lawrence, 2004). They can be organizations or groups of organizations (Garud, Jain, & Kumaraswamy, 2002; Greenwood, Suddaby, & Hinings, 2002), or individuals or groups of individuals (Fligstein, 1997; Maguire et al., 2004). Eisenstadt (1980, p. 848) proposed that institutional entrepreneurs were one variable, among a "constellation" of others, that was relevant to the process of social change. In his work (Eisenstadt, 1964, 1980), institutional entrepreneurship is the adoption by individuals and groups of leadership roles in episodes of institution building (Colomy, 1998). Introducing the notion of institutional entrepreneurship in the framework of institutional theory put more emphasis on the role of actors and agency in institutional change processes. "New institutions arise…", wrote DiMaggio (1988, p. 14), "when organized actors with sufficient resources (institutional entrepreneurs) see in them an opportunity to realize interests that they value highly". He thus revived dimensions of "old institutionalism" (Selznick, 1949, 1957) that had been de-emphasized in institutional studies conducted in the 1980s (DiMaggio & Powell, 1983; Meyer, Scott, & Deal, 1983; Tolbert, 1985; Tolbert & Zucker, 1983; Zucker, 1983).

Building on DiMaggio's (1988) definition and subsequent studies of institutional entrepreneurship, we argue that institutional entrepreneurs are change agents, but not all change agents are institutional entrepreneurs. Actors, in our view, must fulfill two conditions to be regarded as institutional entrepreneurs; (1) initiate divergent changes; and (2) actively participate in the implementation of these changes. Only actors who initiate divergent changes, that is, changes that break with the institutionalized template for organizing within a given institutional context, can be regarded as institutional entrepreneurs (Amis, Slack, & Hinings, 2004; Battilana, 2006; D'Aunno, Succi, & Alexander, 2000; Greenwood & Hinings, 1996). The institutionalized template for organizing, often referred to as an institutional logic

(Dobbin, 1994; Friedland & Alford, 1991; Scott, 1987, 1994; Suddaby & Greenwood, 2005; Thornton, 2002, 2004), is a field's shared understanding of the goals to be pursued and how they are to be pursued. Non-divergent changes are aligned with the institutions in a field, while divergent changes break with them. Only when the changes introduced are divergent with reference to the institutional environment in which they are embedded do change agents qualify as institutional entrepreneurs. Divergent change can be initiated within the boundaries of an organization and/or within the broader institutional context in which an actor is embedded. Active participation in change efforts is the other requirement for institutional entrepreneurship. Actors must actively mobilize resources to implement change to be regarded as institutional entrepreneurs.

We illustrate what we mean by initiating, and actively participating in the implementation of, divergent change through examples of institutional entrepreneurs in two contexts, Britain's health care system and American law firms. The first example is of individual actors, the second of an organization, acting as institutional entrepreneurs. The institutional logic of medical professionalism is the dominant institutionalized template for organizing within the UK's National Health Service (NHS). According to this logic, physicians are the key decision makers in the administrative and clinical domains (Giaimo, 2002). In this context, a clinical manager who initiates a change project aimed at implementing nurse-led pre-admission clinics or nurse-led discharge in a given hospital, thereby transferring both clinical tasks and some decision-making authority from physicians to nurses, qualifies as an institutional entrepreneur (Battilana, Cagna, D'Aunno, & Gilmartin, 2006) because the change project diverges from the dominant institutionalized template of medical professionalism in the UK health care sector. In contrast, a clinical manager who initiates a change project aimed at centralizing information to enable physicians to better control discharge decisions in a given hospital is a change agent but not an institutional entrepreneur. The reason is that this change project is aligned with the dominant institutionalized template for organizing within the NHS (Battilana, 2007).

The introduction in the early 1980s of a new model for organizing within US law firms is another example of institutional entrepreneurship (Sherer & Lee, 2002). Previously, the institutionalized model for organizing within law firms had been the Cravath model, the central component of which was the up-or-out system, whereby, after a number of years (typically six), lawyers were either promoted to partner or asked to leave the firm. In 1982, the highly regarded New York law firm Davis, Polk and Wardell broke with the Cravath model by creating a track for associates who did not make partner, and would not go up again for this position. By implementing a change that diverged from the institutionalized model for organizing within law firms, the law firm Davis, Polk and Wardell effectively acted as an institutional entrepreneur.

Although it contributes to our conceptual understanding, the definition of institutional entrepreneurs as actors who initiate, and actively participate in the implementation of, changes that diverge from existing institutions leaves three questions unanswered: (1) must actors be *willing* to change the institutional environment to be regarded as institutional entrepreneurs?; (2) how far do actors have to go in the implementation of change to qualify as institutional entrepreneurs?; (3) what is the difference between an entrepreneur and an institutional entrepreneur? The first question deals with actors' intentionality, that is, the intended effects of the changes they initiate. According to our conceptual account, and aligned with DiMaggio's (1988) definition, institutional entrepreneurs are characterized by the volition to initiate change. This leaves ambiguous, however, whether actors must be willing to initiate *divergent* change to be regarded as institutional entrepreneurs. Studies of institutional entrepreneurship vary with regard to specifying actors' degree of intentionality. Whereas early studies tended to consider that institutional entrepreneurs purposively develop strategies aimed at trying to change their institutional environments (Colomy, 1998; Colomy & Rhoades, 1994), more recent studies suggest that their intentions can evolve at different steps of the change process (Child, Lua, & Tsai, 2007), and that some actors might *unintentionally* depart from the existing institutions in a field (Lounsbury & Crumley, 2007). Agents without any grand plan for altering their institutions, or even awareness that they are contributing to changes that diverge from existing institutions, might thus end up acting as institutional entrepreneurs. We thus define institutional entrepreneurs as change agents who, whether or not they initially intended to change their institutional environment, initiate, and actively participate in the implementation of, changes that diverge from existing institutions.

The second question has to do with the effect of institutional entrepreneurs' actions. We argue that, notwithstanding the requirement in the foregoing definition that they participate in the implementation of divergent change, actors do not have to be successful in implementing such change to be considered institutional entrepreneurs. Actors, for example, who mobilize the resources needed to introduce a new managerial practice, but fail to convince potential adopters to change their routines, would still be considered institutional entrepreneurs even though the change was ultimately not adopted. Hence, sustainability managers in the Danish biotech company Novozymes acted as institutional entrepreneurs when they attempted, unsuccessfully, to introduce a bottom-of-the-pyramid orientation to sustainability in a company recognized for its consistently high sustainability performance (Olsen & Boxenbaum, 2009). Their goal was to develop low-cost products for emergent markets in the developing world. This bottom-of-the-pyramid approach broke with established organizational practice by pursuing business opportunities that enhanced not only the company's financial performance but also its social performance. The latter consisted in developing new products to alleviate hunger, improve nutrition, or prevent the spread of HIV in disadvantaged regions of the world, concerns that were not traditionally integrated into either the company's product development routines or its corporate sustainability function. The sustainability managers mobilized the needed resources, but were prevented by an interlocking pattern of cognitive, structural, and processual barriers from convincing actors in the line of business to implement the novel practice. As DiMaggio (1988) suggests, such failures to implement divergent change must be quite common, yet they are rarely reported in the institutionalist literature (Greenwood et al., 2002).

The third question deals with the similarities and differences in the concepts of entrepreneurs and institutional entrepreneurs. Although the past decade has seen the publication of many papers on institutional entrepreneurship, surprisingly few discuss the links and potential overlaps between the concepts of entrepreneurship and institutional entrepreneurship (for exceptions, see Hwang and Powell (2005) and Phillips and Tracey (2007)). The creation of new ventures, which is the defining characteristic of entrepreneurs (Lumpkin & Dess, 1996), can follow existing business models or generate new ones (Aldrich, 1999; Aldrich & Fiol, 1994). By our definition of institutional entrepreneurship, only when they generate new business models can entrepreneurs be regarded as institutional entrepreneurs. Peter Walker and his son, Andrew, in creating and managing the Peter Walker & Son brewery in Liverpool in the second half of the nineteenth century, were entrepreneurs. But whereas public houses (i.e., outlets licensed by the state to sell alcohol for consumption on the premises) were run by nominally independent tenants, Peter Walker & Son employed salaried managers who were liable to instant dismissal (Mutch, 2007). In employing a business model that diverged from one that was dominant in the field at that time, the Walkers acted as institutional entrepreneurs.

Institutional entrepreneurship, as this example illustrates, clearly resonates with the research tradition that views entrepreneurs as agents who create new business models for the businesses they start (Lumpkin & Dess, 1996; Schumpeter, 1934). The actions and decisions of entrepreneurs who act as institutional entrepreneurs diverge from the templates used in the institutional environment. The innovative business models they deploy, insofar as they influence the institutional conditions under which others will operate, might have important implications for entrepreneurs who will follow (Haveman, 1993). We thus argue that the concept of entrepreneur overlaps that of institutional entrepreneur, the distinction being that institutional entrepreneurs introduce business models that diverge from the predominant model in the institutional environment, a feature not required of entrepreneurs. Institutional entrepreneurs, however, are not necessarily entrepreneurs as launching a new venture is not an essential element of institutional entrepreneurship.

In summary, we propose that institutional entrepreneurs, whether organizations or individuals, are agents who initiate, and actively participate in the implementation of, changes that diverge from existing institutions, independent of whether the initial intent was to change the institutional environment and whether the changes were successfully implemented. Such changes might be initiated within the boundaries of an organization or within the broader institutional context, within which the actor is embedded. Finally, although entrepreneurs who create business models that diverge from existing institutions might also be institutional entrepreneurs, creating a new venture is neither necessary nor sufficient to qualify an actor as an institutional entrepreneur.

Agency within Institutional Theory

Within the tenets of institutional theory, the concept of institutional entrepreneurship, as defined earlier, seems paradoxical. The question of how organizations or individuals whose beliefs and actions are determined by existing institutions can break with these very same institutions and innovate relates to the *paradox of embedded agency*, which alludes to the tension between agency and structure (institutions) (Holm, 1995; Seo & Creed, 2002). The agency versus structure debate, which stems from assumptions about relationships between actors and their environment, is ongoing in the field of organization studies (Archer, 1982), particularly in the field of institutional theory, in which it has been a source of contention among institutionalists (Heugens & Lander, 2009).

Organization theories are based on different assumptions regarding actors' agency, that is, their ability to intentionally pursue interests and exert some effect on their social environment (Scott, 2001). In the late 1960s, 1970s, and early 1980s, a number of organization theories, including the collective-action and strategic choice views (for a review, see Astley and Van de Ven (1983)) and economic theories of organization, such as public-choice theory, agency theory, and the new institutional economics, tended to isolate organizations from their societal context and focus on analyzing actors' decisions. Institutional theory, contrary to theories that neglected the impact of actors' environments on their individual preferences, decisions, and behaviors, suggests that patterns of action and organization are shaped by institutions, not solely by instrumental calculations (DiMaggio & Powell, 1983; Meyer & Rowan, 1977). It proposes that their behaviors are determined by actors' need to be regarded as legitimate in their institutional environment. Accordingly, during the 1980s, institutional theory was used primarily to explain the observed organizational homogeneity within organizational fields (DiMaggio & Powell, 1983; Tolbert & Zucker, 1983). Although they contributed to the field of organization studies by highlighting the importance of the environment in which organizations are embedded, and explaining the observed isomorphism among organizations subject to similar institutional pressures, these studies were soon criticized for relying on an over-socialized view of action, and not accounting for institutional change (Hirsch & Lounsbury, 1997).

Although it has emerged as a promising way to account for the active role of individual and organizational actors in institutional change, the notion of institutional entrepreneurship has nevertheless spawned controversy, being criticized by some institutionalists for promoting an instrumental and disembedded view of agency that is, arguably, incompatible with institutional theory (Delmestri, 2006; Meyer, 2006). The challenge for institutional researchers is thus to precisely account, within the tenets of institutional theory, for the role of embedded actors in institutional change processes (Dacin, Ventresca, & Beal, 1999). To elaborate a view of agency within the tenets of institutional theory implies a departure from models of rational choice and accounting for agency as situated (Mutch, Delbridge, & Ventresca, 2006). In this view, culture, institutions, and social relations are not just toolkits for actors; they influence actors' cognition and actions in important and often unconscious ways. Their status as social facts implies a need to account for institutions and social relations that constrain and enable, but do not determine, the choices of actors, and for the recursive nature of relations between institutions and actions (Hoffman & Ventresca, 2002; Thornton & Ocasio, 2008).

The challenge for a theory of institutional entrepreneurship is thus to be able to travel the difficult road that passes between a rational choice model of agency on one side and structural determinism on the other. Attempts to open that road and provide some directions for traveling it are associated with renewed interest in structuration theory (Barley & Tolbert, 1997). The most recent developments draw on critical realism (Leca & Naccache, 2006; Mutch, 2007; Thornton & Ocasio, 2008), which considers simultaneously the influence of actors' actions and the structures in which they are embedded; relational sociology (Battilana, 2006; Delbridge & Edwards, 2007; Emirbayer, 1997; Mutch et al., 2006), which insists on the importance of the actors' social positions; and the new German sociology of knowledge (Meyer, 2006), which is grounded in phenomenological analysis and pragmatism. These different approaches have enriched research on institutional entrepreneurship by furthering understanding of the interactions between actors and the institutional environments in which they are embedded, thereby helping to identify the enabling conditions for institutional entrepreneurship and resolve the paradox of embedded agency. In the following section, we present these enabling conditions and explain how they facilitate the emergence of institutional entrepreneurship.

Enabling Conditions for Institutional Entrepreneurship

Resolving the paradox of embedded agency is crucial because it is prerequisite to setting up the theoretical foundation for institutional entrepreneurship

(Battilana & D'Aunno, 2009). A number of studies that would explain how actors can become institutional entrepreneurs despite institutional pressures, and thereby resolve the paradox of embedded agency, cite enabling conditions (Strang & Sine, 2002). Enabling conditions that have been identified range from characteristics of actors' to characteristics of the environments in which they are embedded. The latter are composed of multiple layers; in the manner of Russian dolls, individual actors are embedded in organizations, which are, in turn, embedded in fields (see also Holm (1995) on nested systems), which are recognized areas of institutional life (DiMaggio & Powell, 1983). Building on research on the enabling conditions for institutional entrepreneurship, we propose two key categories of enabling conditions for institutional entrepreneurship: field characteristics, and actors' social position. Field characteristics are likely to influence whether actors become institutional entrepreneurs, but actors perceive field conditions differently depending on their social position in a field, which influences their "point of view" about the field and gives them differential access to resources (Bourdieu, 1988). Actors' social position is thus another enabling condition for institutional entrepreneurship. Whereas previous studies have confirmed their independent effects, we propose a possible interaction effect between these two categories of enabling conditions.

The Enabling Role of Field-level Conditions

Different types of field-level conditions, far from being mutually exclusive, are often interrelated. Jolts and crises that constitute a first form of field-level conditions include social upheaval, technological disruption, competitive discontinuity, and regulatory changes that might disturb the socially constructed, field-level consensus and invite the introduction of new ideas (Child et al., 2007; Fligstein, 1997, 2001; Greenwood et al., 2002; Holm, 1995). The economic and political crises that were among the characteristics of the European Union in the early 1980s, for example, helped to render pivotal the European Commission's role as a collective institutional entrepreneur in the creation of the Single Market (Fligstein & Mara-Drita, 1996). Acute, field-level problems that might precipitate crises are also an important enabling condition (Fligstein & Mara-Drita, 1996; Phillips, Lawrence, & Hardy, 2000; Wade-Benzoni et al., 2002). Problems related to scarcity of resources, for example, can lead actors to migrate and operate as institutional entrepreneurs in other fields in which they are likely to introduce elements divergent from the institutionalized templates of organizing in the new field (Durand & McGuire, 2005).

Degree of heterogeneity and institutionalization are among other organizational field characteristics that might play a role in enabling institutional entrepreneurship. The presence of multiple institutional orders or alternatives constitutes an opportunity for agency and, thereby, for institutional entrepreneurship (Clemens & Cook, 1999; Sewell, 1992). The heterogeneity of institutional arrangements in a field, that is, the variance in the characteristics of different institutional arrangements, is thus an enabling condition for institutional entrepreneurship. Such heterogeneity is likely to give rise to institutional incompatibilities that become a source of internal contradiction, contradiction being defined as a pair of features that together produce an unstable tension in a given system (Blackburn, 1994). An ongoing experience of contradictory institutional arrangements is likely to trigger actors' reflective capacity, enabling them to take some critical distance from existing institutional arrangements (Emirbayer & Mische, 1998; Seo & Creed, 2002; Sewell, 1992). Actors exposed to contradictory institutional arrangements are thus less likely to take existing arrangements for granted and more likely to question, and possibly diverge from, them.

Degree of institutionalization might also influence whether they become institutional entrepreneurs by way of affecting actors' agency (Tolbert & Zucker, 1996). Lower degrees of institutionalization are associated with higher levels of uncertainty in the institutional order, which might provide opportunities for strategic action (DiMaggio, 1988; Fligstein, 1997; Phillips et al., 2000). It is worth noting that most of the empirical studies of institutional entrepreneurship conducted thus far have been in emerging fields that are less institutionalized and consequently characterized by higher levels of uncertainty (Déjean, Gond, & Leca, 2004; Garud et al., 2002; Lawrence, 1999; Lawrence & Phillips, 2004; Maguire et al., 2004; Rao, 1994, 1998; Rao & Sivakumar, 1999). This is not to say that higher levels of institutionalization cannot be conducive to divergent change; institutional entrepreneurship might also occur in relatively highly institutionalized fields (Beckert, 1999). Knowing that degree of institutionalization might play a role in enabling divergent change, we now need comparative studies that systematically explore the influence of varying levels of institutionalization on the emergence of institutional entrepreneurs.

Whereas the field conditions presented previously have largely been considered to be given and exogenous to the actions of actors, recent research suggests that the actions of other actors can generate field conditions that foster opportunities that peers, acting as institutional entrepreneurs, might exploit to precipitate change (Delbridge & Edwards, 2008; Powell & Colyvas, 2008). Although field-level conditions, whether exogenous or the result of the actions of other actors in a field, seem to play an important enabling role in institutional entrepreneurship, all actors embedded in the same field are not equally likely to act as institutional entrepreneurs, the point being that in the face of a range of field-level factors that encourage institutional entrepreneurship, only some actors will exploit the opportunity to become institutional entrepreneurs. This suggests that specific characteristics of actors might also play an enabling role in institutional entrepreneurship, particularly important being the social position an actor occupies within an organizational field.

The Enabling Role of Actors' Social Position

Actors' social position mediates their relation to the environment in which they are embedded (Emirbayer, 1997; Emirbayer & Mische, 1998). Social position is important because it might affect both actors' perception of a field (Bourdieu, 1977) and their access to the resources needed to engage in institutional entrepreneurship (Lawrence, 1999). How social position influences actors', whether individuals or organizations, perceptions of a field's conditions and their capacity to implement change influences, in turn, the likelihood that any given actor will attempt to initiate divergent change.

Although it has been suggested that organizations' status might play a key role in enabling institutional entrepreneurship, there is variance in the findings. Many studies that have explored this issue have found divergent change to be more likely to be initiated by low status organizations (Garud et al., 2002; Haveman & Rao, 1997; Hirsch, 1986; Kraatz & Zajac, 1996; Leblebici, Salancik, Copay, & King, 1991; Tushman & Anderson, 1986), which are said to be at the periphery of a field (Shils, 1975), but some recent studies have found such change being initiated by high-status organizations (Greenwood & Suddaby, 2006; Greenwood et al., 2002; Sherer & Lee, 2002), which are said to be at the center of a field (Shils, 1975). We argue that the observed variance might be due to differences in field characteristics, that is, it might be that whether actors at the center or periphery of a field are more likely to initiate divergent change depends on the field's degree of heterogeneity and institutionalization. The observed variance might also be due to differences in the type of divergent change, which is considered (Battilana, 2007). In other words, depending on the institutions from which they diverge, divergent changes may be initiated by actors occupying different social position. More comparative studies are needed to account for differences across types of institutional contexts and types of divergent changes. These studies should also examine the possible interaction effect between field-level characteristics and actors' social position.

Their position across fields might also influence the likelihood that organizations will engage in institutional entrepreneurship. Findings suggest that the intersection between fields might be more likely to spawn institutional entrepreneurs (Phillips et al., 2000; Rao, Morrill, & Zald, 2000). An example is alternative dispute resolution (ADR), which was conceived as a way to circumvent the American courts' system of resolving minor disputes, often criticized for mismanagement and poorly-designed procedures (Rao et al., 2000). ADR emerged from the combined efforts of multiple actors embedded in multiple fields, "lawyers, social workers, community organization therapists, and judges working for courts, social work agencies, mental health agencies, and community organizations (including churches)" (Rao et al., 2000, p. 253) who developed informal methods of dispute resolution and eventually shared their knowledge and built the ADR options.

Individual actors' social position has also been identified as an enabling condition for institutional entrepreneurship. An example of social position influencing individual actors' likelihood of engaging in institutional entrepreneurship (Cliff, Jennings, & Greenwood, 2006; Dorado, 2005; Maguire et al., 2004) can be found in the field of HIV/AIDS treatment advocacy in Canada. In this field, institutional entrepreneurs tend to be actors whose "subject positions" (Foucault, 1972) provide legitimacy in the eyes of, and the ability to bridge, diverse stakeholders, thereby enabling them to access dispersed sets of resources (Maguire et al., 2004). Here, "subject position" refers to formal position as well as all socially constructed and legitimated identities available in a field. Position across as well as within fields might influence the likelihood that individual actors will engage in institutional entrepreneurship. Actors who are embedded in multiple fields might be more likely to act as institutional entrepreneurs (Emirbayer & Mische, 1998; Sewell, 1992). The individuals who introduced diversity management in Denmark, for example, had previously been exposed to this managerial practice during professional assignments abroad (Boxenbaum & Battilana, 2005). These institutional entrepreneurs, after being embedded in a field in which diversity management was institutionalized, carried the managerial practice and its underlying beliefs back to a Danish setting in which it was unfamiliar and perceived to diverge from the institutionalized managerial practice of treating employees equally. Their multiple embeddedness enabled these institutional entrepreneurs to transpose the managerial practice of diversity management from North America to Denmark and generate a vision for change that resonated with field characteristics in that nation.

We maintain that organizations' and individuals' social positions influence actors' likelihood of engaging in institutional entrepreneurship not only independently, but also jointly, through interaction. That is, the status of the organization in which an individual actor is embedded as well as her hierarchical position and informal network position within an organization are likely to influence not only independently, but also jointly, the likelihood that a given actor will engage in institutional entrepreneurship (Battilana, 2006). For example, while actors who belong to lower status organizations might be more likely to initiate changes that diverge from the institutionalized model of organizations' role division in a field, the influence of organization status might be stronger (or weaker) depending on actors' position in the hierarchy of their organization (Battilana, 2007). This insight suggests a need to further explore how interaction between the individual and organizational levels of analysis influences the process of institutional entrepreneurship.

Even as we propose that field characteristics as well as actors' social position might play key roles in enabling institutional entrepreneurship, we find no indication that these are sufficient to predict institutional entrepreneurship. Among other potential enablers, we recognize, in addition to social position, individual characteristics such as demographic and psychological factors. Research in this area, although promising, will challenge researchers to control for the impact of other field-level and organization-level factors that influence institutional entrepreneurship. Identifying the conditions that enable it is the first step towards establishing the theoretical foundation for, and developing a model of the process of, institutional entrepreneurship. To further develop this model, it will be necessary to specify not only the conditions under which institutional entrepreneurs emerge, but also the process by which divergent change is implemented.

Divergent Change Implementation

Institutional entrepreneurs, because they initiate and implement divergent change, are one category of change agent. The management literature on change has shown change agents to undertake specific activities in support of the implementation of change projects (Beer, Eisenstat, & Spector, 1990; Judson, 1991; Kotter, 1995; Rogers, 1962). Building on Lewin's (1947) three-phase model of change, prior conceptual and empirical studies (differences notwithstanding) emphasize three sets of activities involved in change implementation (Beckhard & Harris, 1977; Beer, 1980; Ford & Greer, 2005; Kanter, 1983; Nadler & Tushman, 1989; Tichy & Devanna, 1986). Although they are given different labels, these activities correspond to developing a vision and mobilizing people behind that vision, and motivating them to achieve and sustain it (for reviews, see Armenakis and Bedeian, (1999), Battilana, Gilmartin, Pache, Sengul, and Alexander (in press) and Kanter, Stein and Jick, (1992)). *Developing a vision* encompasses activities undertaken to make the case for change including sharing the vision of the need for change with followers. *Mobilizing people* includes activities undertaken to gain others' support for and acceptance of new routines. *Motivating others to achieve and sustain the vision* consists of activities undertaken to institutionalize change. The question we address is how the divergent nature of the change they implement influences institutional entrepreneurs' approach to these activities.

Implementing change that builds on existing institutions is challenging, implementing change that breaks with existing institutions more so. Institutional entrepreneurs who promote the latter type of change are challenged to envision the divergent change and mobilize allies in support of its implementation, which entails "loosening" the institutional embeddedness of those being mobilized. Institutional entrepreneurs also must counter political opposition. "Institutional defenders" who benefit from the status quo (DiMaggio, 1988; Levy & Scully, 2007) almost invariably arise to defend existing beliefs and practices. This pattern is all the more pronounced if the proposed divergent change threatens established organizational privileges and social position within the organizational field.

To surmount the challenges of embeddedness and political opposition might require on the part of institutional entrepreneurs, as well as the enabling conditions enumerated earlier, higher-level mastery of certain activities involved in change implementation. Institutional entrepreneurs can sometimes impose institutional change without having to win over dissenting actors (Battilana & Leca, 2009; Dorado, 2005). But such instances are rare, as dominant players are usually keener to support maintenance of, than changes to, institutions from which they benefit (DiMaggio, 1988). It is in the latter situations that institutional entrepreneurs are called upon to articulate a vision for the divergent change they are promoting and mobilize allies to support its implementation. Although we treat these key sets of actions as distinct, consecutive steps in the process of institutional entrepreneurship, we recognize that they are in practice intertwined, and that visions for change continue to evolve throughout the process of mobilizing allies.

Creating a Vision for Divergent Change

Supported by conditions that enable, despite institutional pressures towards stasis, their emergence, institutional entrepreneurs must craft a vision for divergent change in terms that appeal to the actors needed to implement it, a challenge given that the changes promoted by institutional entrepreneurs tend to break with practices taken for granted by people in the field. Research on framing in the social movement literature helps to illuminate the issues faced by an institutional entrepreneur attempting to develop a vision that frames a change project (1) in terms of the problem it helps to resolve; (2) as preferred to existing arrangements; and (3) as motivated by compelling reasons (Rao et al., 2000; Snow & Benford, 1992). These dimensions translate into corresponding forms of framing, namely, *diagnostic framing, prognostic framing,* and *motivational framing* (Markowitz, 2007; Misangyi, Weaver, & Elms, 2008).

Diagnostic framing seeks to make explicit the failing of the existing organization or broader field, expose problems with current institutionalized practices and assign blame (Suddaby & Greenwood, 2005). The institutional entrepreneurs who introduced diversity management to Denmark in 2001, for example, leveraged a diagnostic frame available in Denmark at the time. The integration of immigrants into the workforce had been construed as a societal problem and attributed to taken-for-granted ways of selecting, perceiving, and treating immigrants in Danish society (Boxenbaum, 2006; Boxenbaum & Battilana, 2005). Adopting this diagnostic frame, the institutional entrepreneurs introduced diversity management as a superior solution to the integration of immigrants. Diversity management was thus selected as a prognostic frame.

Prognostic framing, in casting a promoted project as superior to a previous arrangement, engages the institutional entrepreneur in de-legitimating existing institutional arrangements and those supported by opponents (Creed, Scully,

& Austin, 2002; Suddaby & Greenwood, 2005), and in legitimating to stakeholders and other potential allies the project at hand (Déjean et al., 2004; Demil & Bensédrine, 2005). This effort implies theorizing the institutional project in a way that resonates with the interests, values, and problems of potential allies (Boxenbaum, 2006; Boxenbaum & Daudigeos, 2008; Fligstein, 2001; Suddaby & Greenwood, 2005). Projects that depart significantly from existing institutions must thus be characterized as less radical to forestall reactions of fear, incomprehension, or apparent irrelevance that might inhibit potential allies from changing their perspective.

The third dimension, *motivational framing*, entails providing compelling reasons to support the new vision being promoted (Misangyi et al., 2008). To design the appropriate motivational frame, institutional entrepreneurs must be able to imaginatively identify with the states, and relate to the interests, of others (Fligstein, 1997). They must also possess sufficient social skills, including the ability to analyze and secure cooperation, to assess the configuration of, and act according to, their position and the positions of other agents in the field (Fligstein, 2001). For instance, socially responsible (SR) mutual funds companies operating as institutional entrepreneurs in the United Stated relied on a form of motivational framing, which insisted on the fact that SR funds can deliver both access to high financial returns and effective social change.

Socially skilled institutional entrepreneurs cognizant of and sensitive to the discursive (Maguire & Hardy, 2006) and cultural contexts (Boxenbaum & Strandgaard Pedersen, 2009) in which they are embedded can draw selectively from the institutional context in framing their visions (Fligstein, 1997). They are able, by relating to their situations, to craft visions that other actors are inclined to endorse. For example, France's first social rating agency, ARESE, developed a measure of companies' corporate social performance that diverged from, but was framed in a way that made it appear to be congruent with, the existing norms of the financial market sector (Déjean et al., 2004). ARESE developed a measure of corporate social performance that resembled well-established ways of evaluating organizational performance and so could be integrated within fund managers' traditional decision-making processes. ARESE formulated quantitative measures with which to generate the "ARESE notation" that financial executives regarded as more serious and legitimate than monographs about companies. Fund managers willing to develop socially responsible investment funds were able, using this tool, which was more aligned with the dominant logic of the financial world, to legitimize themselves in the financial community. In addition to framing projects that fundamentally break with them as being somehow aligned with existing institutions, institutional entrepreneurs can also frame proposed changes as being mutually beneficial and introduce themselves, thereby, as neutral brokers acting on behalf of the common good (Fligstein, 1997). Presenting a sponsored norm or pattern of behavior as altruistic (Fligstein, 1997), or nesting it in impersonal institution-based trust through standard structures and stable rules (Haveman & Rao, 1997), can motivate actors to alter their perspective in a way that inclines them to mobilize behind a vision for divergent change.

It might be reasonable to expect that institutional entrepreneurs might need to possess a higher level of mastery of framing than actors promoting non-divergent change. This is so because institutional entrepreneurs face the unique challenge of having to justify divergence from taken-for-granted practices and frame the vision for that change in a way that enables others, despite its unfamiliar nature, to understand and endorse it. We have identified three types of framing, that which generates a sense of urgency (diagnostic framing), and that which present and promote a vision for a proposed change (prognostic framing and motivational framing). Although we present the creation of the vision and the mobilization of allies behind it as two distinct sets of actions, articulating a vision and mobilizing allies to support it are intertwined activities.

Mobilizing Allies

Although the labels they use differ from those used in the change management literature, studies of institutional entrepreneurship focus mainly on how institutional entrepreneurs manage the mobilization activities associated with change implementation. Because divergent change can seldom be implemented without support, institutional entrepreneurs must typically mobilize allies (Fligstein, 1997; Greenwood et al., 2002) and cultivate alliances and cooperation (Fligstein, 2001; Lawrence, Hardy, & Phillips, 2002; Rao, 1998). Institutional entrepreneurs thus need to define the protagonists, antagonists, and other actors who might be involved in a divergent change effort (Scully & Creed, 2005). Defining and redefining identity is central to attracting others and building a sustainable coalition (Rao et al., 2000). The aim is to coalesce allies and reduce inherent contradictions in the coalition, and at the same time exacerbate contradictions among opponents by emphasizing the failings of existing institutionalized practices and norms and demonstrating that adoption of the proposed vision will assure improvement (Fligstein, 1997; Haveman & Rao, 1997; Holm, 1995; Rao, 1998; Seo & Creed, 2002; Suddaby & Greenwood, 2005). Such a strategy implies a high level of either empathy with potential allies (Fligstein, 1997) or Machiavellian strategic skills (Levy & Scully, 2007).

Mobilization activities include, in addition to the use of discourse, the marshalling of other resources. Although the discursive element has thus far received the greatest attention in the literature on institutional entrepreneurship, recently there have been calls for studies that account for how institutional entrepreneurs mobilize other resources to secure endorsement, and support for the implementation, of divergent change.

Use of discourse. Having developed and articulated a vision, institutional entrepreneurs must convince different constituencies embedded in the existing institutions of the need for the change and mobilize them behind it. The case for divergent change thus requires particular skills in communicating a vision that mobilizes allies. Principal among the challenges of doing so is to make change that breaks with existing institutions resonate with other actors embedded in those institutions. Institutional entrepreneurs accomplish this not only by means of framing when they develop the vision for change, but also by means of "rhetorical strategies" (Suddaby & Greenwood, 2005) when they communicate this vision. These rhetorical strategies somehow connect the institutional entrepreneurs' innovations to familiar templates, while at the same time emphasizing the need for change.

Institutional entrepreneurs develop and assemble in narratives rhetorical arguments that refer to established institutional logics. They build their discourse based on institutional logics which, they anticipate, will resonate with the values and interests of potential allies. Promoters of socially responsible investment in France, for example, referred to a financial rather than an environmental logic in anticipation of support from the financial community being more decisive than that of activists (Déjean et al., 2004). These logics are associated with specific "institutional vocabularies", including structures of words, expressions, and meanings, which are used by institutional entrepreneurs to articulate, manipulate, and recombine institutional logics (Suddaby & Greenwood, 2005, p. 43). Institutional entrepreneurs often use analogies to help legitimize their vision for change (Douglas, 1986; Hargadon & Douglas, 2001; Leblebici et al., 1991). For example, the Global Reporting Initiative (GRI), which aimed to institutionalize the practice of sustainability reporting, used the analogy between sustainability reporting and financial reporting to gain legitimacy in the early stages of the change implementaion process. As the GRI's guidelines gained more acceptance, the organization reduced the extent to which it employed the analogy, emphasizing also the dissimilarities between the two forms of reporting (Etzion & Ferraro, in press).

Institutional entrepreneurs can develop stories, link past events to form a plot, define heroes and villains, some positioned as key to the future of the field (Morrill & Owen-Smith, 2002; Zilber, 2007), by gathering and re-employing symbolic stories of past events that litter the organizational landscape (Meyer & Rowan, 1977), or emphasizing, and relating single, local stories to more general issues. They may do so with the purpose of helping to subvert the established institutional order. Institutional entrepreneurs can propose a theorization of such stories (Morrill & Owen-Smith, 2002), theorization referring to the rendering of particular stories or practices in more general and rationalized terms that will make them attractive to a variety of potential adopters (Greenwood et al., 2002). This storytelling is afforded legitimacy by employing, tacitly or explicitly, well-established discursive conventions, called "narrative styles", to construct substantive imageries that lend coherence and meaning to plots and accent devices (Morrill & Owen-Smith, 2002). Some narrative styles are archetypal and widely diffused, such as tragedy, comedy, romanticism, and satire (White, 1973). Others will be related to specific organizations and historical contexts such as private corporations (Morrill, 1995) and social movements (Gamson, 1992), and thus be relevant to more local populations (Morrill & Owen-Smith, 2002). Zimmerman and Zeitz (2002), reviewing the development of Internet entrepreneurs, suggest that these actors introduced themselves as "fashion setters" and combined narrative styles that were calculated to especially resonate with venture capitalists. They selected narrative styles steeped in fascination with innovation and traditional narrative styles related to financial performance.

Resources mobilization. Resources that might be mobilized to induce endorsement, and support for the implementation, of divergent change (Misangyi et al., 2008) were, until recently, little researched (Battilana & Leca, 2009; Misangyi et al., 2008). But a full understanding of the process of divergent change implementation relies on an appreciation for the different types of resources institutional entrepreneurs mobilize (Levy & Scully, 2007). We maintain that financial resources and resources related to social position, such as formal authority and social capital, play a key role in helping institutional entrepreneurs convince other actors to endorse and support the implementation of a vision for divergent change.

Implementing any change is costly, and because the implementation of divergent change is more challenging, and likely to require more resources, it is likely to be more costly (Misangyi et al., 2008). Financial assets can be used during early stages of the institutional entrepreneurship process to bypass the sanctions likely to be imposed by opponents of a proposed change (Greenwood et al., 2002) as well as to ride out the negative costs of the transitional period during which new ideas are likely to be unpopular (Greenwood & Suddaby, 2006). They can also be used to bring other players into a coalition. Sun, for example, was able to induce systems assemblers, software firms, and computer manufacturers to contribute to the network-centric approach to computing it was proposing to oppose Microsoft's Windows by providing free access to Java instead of charging for that resource (Garud et al., 2002). Institutional entrepreneurs can also use financial resources to encourage important stakeholders to favor a project (Demil & Bensédrine, 2005), which might suggest that larger players are more likely to be successful institutional entrepreneurs (Greenwood et al., 2002). The example of Rockfeller as developed by Chernov (1998) illustrates this point: because he controlled most of the oil refineries in the United States, John D. Rockfeller could change the way the oil market worked by controlling prices, and other actors were unable to oppose his changes (Dorado, 2005).

Apart from financial resources, research on institutional entrepreneurship also insists on the importance of social position not only to initiating, but also to promoting, divergent change. Social position can help institutional entrepreneurs mobilize allies to support the implementation of divergent changes. For example, high-status organizations can leverage their status to impose divergent changes in a field of activity (Sherer and Lee, 2002). When their social position does not enable them to easily mobilize others, institutional entrepreneurs might try to convince actors who themselves occupy higher status social positions, to endorse their project. Institutional entrepreneurs can then leverage the endorsement of such higher status actors to increase the legitimacy of their project and thereby mobilize other actors behind it. Existing research distinguishes between formal authority and social capital as potential sources of power associated with social position.

Formal authority refers to an actor's legitimately recognized right to make decisions (Phillips et al., 2000, p. 33). The authority of the state (DiMaggio & Powell, 1983) and authority conferred by formal positions are formal authorities. Formal authority can help institutional entrepreneurs legitimize divergent ideas (Maguire et al., 2004), frame stories (Fligstein, 2001), and promote acknowledgment and "consumption" of their discourse by other actors (Phillips, Lawrence, & Hardy, 2004). Although social position can confer formal authority that can be leveraged to implement directly divergent change, institutional entrepreneurs can also mobilize other actors who possess formal authority as a way to strengthen a coalition that supports a divergent change project.

Social capital is associated with actors' informal network positions; it accrues to one's position in a web of social relations that provides access to information and political support. Institutional entrepreneurs can leverage social capital to influence others, as by severing links between select groups, which can then be enlisted as allies, and the rest of the field. Their social capital might enable institutional entrepreneurs to champion and orchestrate collective action among diverse stakeholders (Maguire et al., 2004). Being in a position to broker among groups that would otherwise not be connected affords an opportunity to assemble a coalition around a vision for divergent change. Institutional entrepreneurs might present themselves as neutral brokers mediating on behalf of the mutual best interest of different groups (Fligstein, 1997). Delors pursued just such a strategy in mediating among the disparate members of the European Union (EU) to create a "Single Market". Before becoming president of the EU, Delors toured the European capitals to make the argument to governments that were no longer engaged in dialogue that the EU had to launch some project in order to move forward. Eventually, the Single Market emerged as the most viable project. A central position in a field can also help to ensure that the texts created by an institutional entrepreneur will be acknowledged and consumed (Phillips et al., 2004). Recent research suggests that institutional entrepreneurs are likely to possess a high level of "reach centrality", defined as access to a large number of field members through a limited number of intermediaries (Oliver & Montgomery, 2008). Institutional entrepreneurs who are not themselves central to a field might be able to cultivate ties with actors who are. In so doing, they are able to secure the endorsement and support of these actors and gain access to the resources they control. Institutional entrepreneurs can enhance the legitimacy of change projects by, for example, mobilizing support for them among key constituents such as highly embedded agents (Lawrence et al., 2002) and professionals and experts (Hwang & Powell, 2005) who operate at the center of a field.

The Influence of Field Characteristics

The process of implementing divergent change is also likely to be influenced by field characteristics (Wijen & Ansari, 2007), in particular, levels of institutionalization and fragmentation. Institutional entrepreneurs who operate in fields with high levels of institutionalization frame discourses that resonate with the interests and values of members of the dominant coalition (Greenwood et al., 2002; Suddaby & Greenwood, 2005). This choice is appropriate when a coalition is unified. But when the field is heterogeneous, that is, populated not by one coalition but by fragmented groups, the institutional entrepreneur needs to find a common ground and elaborate an encompassing discourse that resonates with the interests and values of all the different actors (Fligstein, 1997; Hsu, 2006). It is, for example, the strategy that Jacques Delors used to mobilize support around the notion of a common market among the governments of the EU at a time when those governments could not agree on a common purpose (Fligstein & Mara-Drita, 1996).

Institutional entrepreneurs adopt other discursive strategies when they operate in less institutionalized fields, as when they engage in developing emerging fields characterized by a low degree of institutionalization. They might, for example, formulate a vision that aims to establish a common identity specific to the actors who will be part of the new field (Markowitz, 2007; Rao et al., 2000). Like leaders of social movements, institutional entrepreneurs can mobilize support in an emerging field by crafting an attractive social identity that appeals to potential field members. Institutional entrepreneurs in less institutionalized fields might also need to legitimize the new field in the eyes of major stakeholders on whom field members are likely to depend (Aldrich & Fiol, 1994; Déjean et al., 2004; DiMaggio, 1991; Koene, 2006; Rao et al., 2000). Emerging fields favor institutional entrepreneurs' use of rhetorical strategies that exploit the general fascination with novelty (Zimmerman & Zeitz, 2002). Institutional entrepreneurs might become fashion setters in creating new fields that interest and attract new field members, and simultaneously legitimize the field with centrally positioned actors in adjacent fields.

Although discursive strategies might differ according to the characteristics of the field in which an institutional entrepreneur operates, little effort has thus far been devoted to studying systematically how the different activities that constitute institutional entrepreneurship vary in different contexts (Maguire et al., 2004). For example, little is known about how institutional entrepreneurs mobilize financial resources, formal authority, and social capital across contexts. We also know little about which approaches to managing the process of divergent change implementation work best in which contexts. Their success, as we have shown previously, depends to a great extent on institutional entrepreneurs' access to, and skills in leveraging, the scarce and critical resources (Fligstein, 1997; Lawrence, Mauws, Dyck, & Kleysen, 2005) needed to mount political action (Seo & Creed, 2002). Previous findings help to lay the groundwork for the development of a contingent model of the process of divergent change implementation. Further attention to the question of context might help predict both the selection of different resource mobilization strategies and the likelihood that they will be successful in a given context. Although the discursive aspect of mobilizing activities in which institutional entrepreneurs engage has thus far received most of the attention in the literature on institutional entrepreneurship, recent studies suggest that the institutionalization process might not be only discursive (Lounsbury & Crumley, 2007). Yet, the non-discursive dimension of the process of divergent change implementation remains the subject of scant research. Finally, we note that of the three activities in which institutional entrepreneurs engage when implementing divergent change, creating a vision and mobilizing allies have received by far the most attention. The activities involved in motivating actors to realize and sustain a vision, that is, to institutionalize change, have been studied the least in the literature on institutional entrepreneurship.

Although, as we emphasized earlier, some important questions remain to be answered, our analysis thus far has yielded a contingency model of institutional entrepreneurship that extends from its emergence to the possible institutionalization of divergent change. It also accounts for the influence of both field characteristics and actors' social position. Figure 8.1 shows how field characteristics and social position enable actors, despite institutional pressures towards stasis, to engage as institutional entrepreneurs in the implementation of divergent change that involves the creation of a vision and the mobilization of allies. Institutional entrepreneurs, because they initiate changes that break with existing institutions, face specific challenges arising from other actors' institutional embeddedness as well as potential political opposition. How institutional entrepreneurs manage the process of divergent change implementation is influenced by both field characteristics and actors' social positions. Divergent change might then diffuse throughout the field. If it does, the resulting institutional change will likely ultimately affect field characteristics and, thereby, possibly actors' social position. The model outlined here will no doubt evolve as future research provides a more fine-grained understanding of the process. It is meant to provide a basis for future work and reflection about institutional entrepreneurship. In the next section,

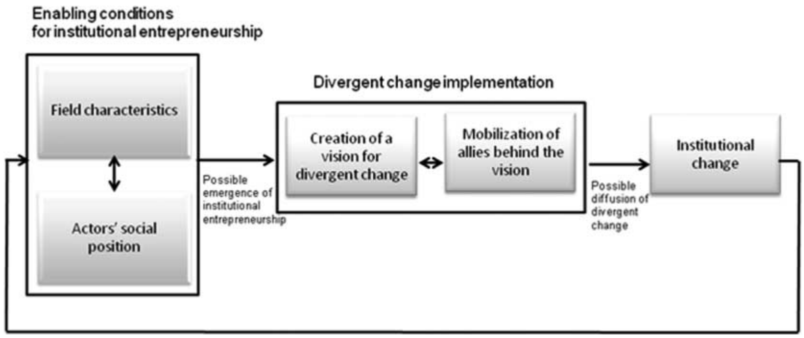

Figure 8.1 Model of the Process of Institutional Entrepreneurship.

we suggest directions for future research in institutional entrepreneurship that, we believe, will have important theoretical as well as practical implications not only for the field of institutional theory, but also, more broadly, for the field of organization theory.

Evolving the Field of Research on Institutional Entrepreneurship

As explained earlier, the concept of institutional entrepreneurship has been a source of controversy among institutionalists, previously having been criticized for promoting a disembedded view of agency (Delmestri, 2006; Meyer, 2006). Acknowledging that it is a possible drift, we argue that it is possible, building on our model of institutional entrepreneurship, to develop a robust, embedded view of institutional entrepreneurship and agency that fits well with the tenets of institutional theory. This view aligns with recent studies of institutional entrepreneurship that are moving away from heroic views of individuals in favor of construing institutional entrepreneurs as individual or collective actors embedded in, and trying to navigate, specific social contexts by mobilizing other actors to partake in divergent change projects. We urge that future research continues to improve our understanding of the process of institutional entrepreneurship, and to consider possible implications for and contributions to related streams of research in organization theory.

Our analysis leads us to emphasize the following directions for future research on the process of institutional entrepreneurship. We need, first, to continue to improve how we account for the embeddedness of institutional entrepreneurs. We also need a more vivid analysis of institutional dynamics and agency that builds on the research on institutional entrepreneurs that has increasingly promoted a more distributed view of agency. Related to these lines of research, we urge an expansion of the levels of analysis as a way to further our understanding of institutional entrepreneurship and agency within the context of institutional theory. We further urge that future research on institutional entrepreneurship more fully exploit synergies among the different research streams that are somehow related to institutional entrepreneurship such as research on change management, entrepreneurship, social entrepreneurship, and social movements. Finally, we conclude by emphasizing consideration of the importance of the practical implications of research on institutional entrepreneurship.

Accounting for the Embeddedness of Institutional Entrepreneurs

Research on institutional entrepreneurship has been instrumental in reintroducing agency to institutional theory and imparting some theoretical and empirical understanding of how embedded actors can shape institutions. Embeddedness, being central to shaping the possibilities for actors to exercise agency, constitutes the context within which institutional entrepreneurs act. Characteristics of the social environment as well as actors' position within this environment are crucial variables in understanding the emergence of institutional entrepreneurs, as is actors' awareness of other fields and diverse institutional logics. All of this implies that more systematic research and clear typologies of variables and contexts are needed to move beyond monographs.

A consistent typology of organizational fields that would make an important contribution to more systematic research on institutional entrepreneurship remains to be developed. Our review of the literature identified two frequently referenced field characteristics, namely degree of fragmentation and degree of institutionalization, both of which might constitute a first step towards a typology of fields. Ranking fields high or low on each of these dimensions might enable researchers to identify four ideal-types of fields (highly institutionalized fragmented fields, highly institutionalized unified fields, less institutionalized fragmented fields, and less institutionalized unified fields). Such a typology would support more systematic, cross-context comparisons of the process of institutional entrepreneurship.

Finally, most studies thus far have focused on actors' embeddedness in a given field of activity. More studies that account for actors' (whether organizations or individuals) embeddedness in multiple fields are needed. Research suggests that multiple embeddedness might be a key enabling condition for institutional entrepreneurship (Boxenbaum & Battilana, 2005; Durand & McGuire, 2005; Greenwood & Suddaby, 2006). Among the questions that remain to be answered regarding the impact of actors' multiple embeddedness are: (1) whether the likelihood of acting as an institutional entrepreneur is influenced by the degree of similarity between the different institutional fields in which an actor is embedded; and (2) how multiple embeddedness affects the process of divergent change implementation.

Accounting for a Distributed View of Agency in Institutional Processes

Early studies of institutional entrepreneurship focused on the actions of a single actor. But recent studies that have begun to account for the possible collective dimension of institutional entrepreneurship (Canales, 2008; Lounsbury & Crumley, 2007; Rao et al., 2000) suggest that it might be a collective phenomenon that involves different actors with access to varying kinds and levels of resources who act in either a coordinated or uncoordinated way. Lawrence et al. (2002) show how inter-organizational coordination can contribute to institutional change, especially when the partners in the collaboration are highly involved in the project and deeply embedded within the organizational field, thus having both the motivation and means to foster diffusion. Collective institutional entrepreneurship can also be uncoordinated. Dorado (2005) labeled as "institutional partaking" such situations in which institutional change cannot be attributed to any single individual or organization, but rather results from the accumulation of countless institutional entrepreneurs' uncoordinated divergent actions. Consistent with this idea is, as noted earlier, the notion that institutions can be changed by "spatially dispersed, heterogeneous activity by actors with various kinds and levels of resources" (Lounsbury & Crumley, 2007, p. 993; see also Holm, 1995).

Considering agency to be distributed affords a more realistic view of institutional processes as political and non deterministic, and of the outcomes, being dependent on the actions and reactions of multiple actors, as being by definition uncertain (Delbridge & Edwards, 2008; Garud et al., 2007; Meyer, 2006; Reay & Hinings, 2005). Institutional change might be occasioned by unintended actions of ordinary actors who break with institutionalized practices without being aware of doing so. But because the institutionalization process most often remains a political one, certain practices might not become institutionalized without the intervention of actors acting strategically (Brint & Karabel, 1991; DiMaggio, 1988; DiMaggio & Powell, 1991; Friedland & Alford, 1991; Hargrave & Van de Ven, 2006; Zilber, 2002). This area of development speaks to the need for a robust theory of collective action among institutional entrepreneurs and other actors in a field.

When agency is considered to be distributed, politics and collective mobilization become central to understanding how diverse actors can coalesce. The ongoing integration of concepts and research on change from the social movement literature in institutional analysis (Schneiberg & Lounsbury, 2008) can be instrumental here. Future empirical research should pay more attention to the diversity of actors who coalesce around an institutional project (Powell & Colyvas, 2008). A recent suggestion by Lawrence and Suddaby (2006) complements the body of work on institutional entrepreneurship by providing a framework for accounting for the multiple actors directly involved in the political struggle and the interactions among them. They propose that researchers analyze the "institutional work" of actors purposively attempting to create, maintain, or disrupt institutions, and thereby expand analysis beyond institutional entrepreneurs (Lawrence, Suddaby & Leca, 2009). Reay and Hinings' (2005) analysis of field members' actions during institutional processes, and Delbridge and Edwards' (2008) account of the variety of actors who contribute in varied ways to a process of institutional change, provide directions in which to extend the scope of analysis so as to account for a broader view of agency in institutional processes.

Developing a distributed view of agency should also lead to consideration of how institutional entrepreneurs are able to ensure the stabilization and possible diffusion of divergent change at the field level. Most current research on institutional entrepreneurship focuses on the first steps of the implementation process without accounting for how they might contribute to institutionalize the change. What is at stake is to understand how institutional entrepreneurs and/or other actors can ensure the maintenance of the novel practices they promote, a dimension that the current analysis of institutional entrepreneurship does not fully integrate (Hwang & Powell, 2005; Jain & George, 2007; Wijen & Ansari, 2007).

Expanding the Levels of Analysis

The directions for future research outlined earlier will require that the levels of analysis used in the study of institutional entrepreneurship be expanded. Although most research has been concentrated at them, the organizational field and organizational levels cannot be considered a requirement of institutional theory. The community and individual levels of analysis, which have received scant attention thus far in studies of institutional entrepreneurship, should be accounted for in future studies. Individual actors are embedded in organizations that are embedded not only in organizational fields but also in local geographic communities. The community level of analysis corresponds to the populations, organizations, and markets located in a geographic territory that share, as a result of their common location, elements of local culture, norms, identity, and laws (Marquis & Battilana, in press). Recent research has shown that the local level has not only remained important, but in many ways local particularities have become more visible and salient, as globalization has proceeded (Bagnasco & Le Galès, 2000; Greenwood, Diaz, & Lorente, in press; Marquis, Glynn, & Davis, 2007; Sorge, 2005). Actors' simultaneous embeddedness in local geographic communities as well as broader global environments might influence the likelihood that they will act as institutional entrepreneurs. Their multiple embeddedness might also influence the process of divergent change implementation.

In addition, research that accounts for institutional entrepreneurship at the individual level remains limited (Reay, Golden-Biddle, & GermAnn, 2006). The influence of individual-level variables on the process of institutional entrepreneurship should not be overlooked. Accounting for the possible role of individual agency and trying to better understand its features and origins do not imply that individuals' actions are the only sources of divergent change. We are in accord with the view that individuals are but one among many elements that interact in complex ways to bring about institutional effects, as explained in the previous section. We insist, however, that their possible role in institutional processes, including in the process of institutional entrepreneurship, should not be neglected. Individual factors might play a role both in the emergence of institutional entrepreneurship and in the process of divergent change implementation. A few studies (Maguire et al., 2004; Seo & Creed, 2002) have acknowledged the possibility that individual factors might enable divergent change. Mutch (2007) suggests that institutional entrepreneurs are able to abstract from the concerns of others and take an autonomous reflexive stance. Complementing this approach, and relying on Emirbayer and Mische's (1998) multi-dimensional view of agency, Battilana and D'Aunno (2009) propose that the three dimensions of agency—iteration (habit), projection (imagination), and practical evaluation (judgment)—might play a role in institutional entrepreneurship. In the case of institutional entrepreneurs, the projective dimension of agency dominates others. The question is thus to know under what conditions the projective dimension of agency dominates. Although field characteristics and actors' social position have been shown to influence actors' agency, other individual-level conditions such as psychological factors might affect actors' agency. This relationship wants further exploration.

Finally, because institutional entrepreneurship is a complex process that involves different types of actors (e.g., individuals, groups of individuals, and organizations), multi-level studies might take account of the field, community, organizational, and individual levels of analysis (Rousseau, 1985). Such multi-level research has been proposed as a promising avenue within the framework of institutional theory, but remains to be developed (Friedland & Alford, 1991; Ocasio, 2002; Palmer & Biggart, 2002; Reay et al, 2006; Scott, 2001; Strang & Sine, 2002). This multi-level research is necessary to develop a more fine-grained understanding of the processes of institutional entrepreneurship and, more broadly, of institutional change. Only this type of research will enable scholars to reconcile the need to account for a distributed view of agency in institutional processes with the need to account for the role of individual actors in institutional processes, including in the process of institutional entrepreneurship.

Building Bridges with Other Streams of Research

It became clear as research on institutional entrepreneurship was developing that contributions could be expected in several domains, the most obvious being institutional theory. Research on institutional entrepreneurship has been instrumental in nurturing such emerging streams of research in institutional theory as "institutional work", which attempts to account for actions intended to create, maintain, and disrupt institutions (Lawrence & Suddaby, 2006), and the emerging articulation between institutional theory and the "practical turn" in the social sciences (Jarzabkowski, Matthiesen, & Van de

Ven, 2009; Lounsbury & Crumley, 2007). As our analysis emphasizes, however, the stream of research on institutional entrepreneurship relates not only to institutional theory but also to a number of other research domains that deal with actors who introduce novel elements into an organization or into their broader environment, including research on entrepreneurship, social entrepreneurship, change, and social movements.

Surprisingly, the interaction between research on institutional entrepreneurship and research on entrepreneurship has seldom been discussed. Phillips and Tracey (2007) recently argued that more dialogue is needed between these traditions, and prominent researchers in entrepreneurship view this approach as a promising stream in the domain (Ireland, Reutzel, & Webb, 2005). Given the growing interest in how existing institutional arrangements shape entrepreneurship, research on how entrepreneurs can shape those arrangements seems quite relevant. Lounsbury and Glynn (2001) use research in institutional theory to demonstrate the importance of culture in entrepreneurship and how entrepreneurial stories facilitate the crafting of a new identity that serves to legitimize a venture in the eyes of other stakeholders, thereby affording access to new capital and market opportunities. Another emerging line of inquiry examines how field conditions shape entrepreneurial activity, which might, in turn, shape the field conditions. Sine and David's (2003) study of the US electric power industry, for example, documented how environmental jolts stimulate entrepreneurial activity by destabilizing the institutional structures that otherwise impede such activity. Encouraged by this destabilization and crisis, entrepreneurs generate new solutions or repackage existing practices, which collectively create a "solution bazaar" of alternatives to the incumbent institution (Sine & David, 2003, p. 188). Entrepreneurship and institutional entrepreneurship processes might thus be intertwined, as is the case when entrepreneurs develop business models that break with those of existing institutions. Future research should analyze the specific challenges that face entrepreneurs who also act as institutional entrepreneurs as well as similarities and differences between the entrepreneurship and institutional entrepreneurship processes (e.g., do entrepreneurs and institutional entrepreneurs need similar skills? What are the similarities and differences between the activities in which they engage?). Future research should also pay closer attention to the outcomes of these processes when they are intertwined. A new venture breaking with existing institutions might be a commercial failure, but succeed in helping to legitimize a new organizational form. More research is thus needed at the intersection of entrepreneurship and institutional entrepreneurship. One emerging area to which both streams are likely to contribute is social entrepreneurship.

Social entrepreneurs create organizations that address social problems ignored or addressed ineffectively or inefficiently by existing organizations (Mair & Martí, 2006; Seelos & Mair, 2005; Zahra, Gedajlovic, Neubaum, &

Shulman, in press). They differ from other entrepreneurs to the extent that they privilege social value over the generation of economic rents (Dacin, Dacin, & Matear, 2007). Social entrepreneurs whose proposed solutions to social problems diverge from the existing institutions in a field of activity can be regarded as institutional entrepreneurs (Mair & Martí, 2006). Commercial microfinance organizations that provide loans to low-income entrepreneurs under market conditions are an example (Battilana & Dorado, 2007). Commercial microfinance organizations are institutional entrepreneurs because they combine two potentially competing institutional logics in an innovative way, thereby diverging from both. Like their not-for-profit counterparts, they are driven by the value of social development: their purpose is to help the poor disenfranchised from conventional banks by democratizing access to credit and other financial services. But unlike their not-for-profit counterparts, commercial microfinance organizations are regulated by banking laws that require that fiduciary obligations towards investors and depositors be fulfilled. They thus deal with both the development logic that guides their mission to help the poor and the banking logic that dictates that the interest rates they charge generate profits sufficient to enable them to fulfill their fiduciary obligations. Research on institutional entrepreneurship can be fruitfully mobilized to inform our understanding of the challenges faced by such social entrepreneurs and the strategies they employ to meet them. With the current economic crisis forcing a rethinking of our economic system, it is crucial that the sustainability conditions of organizations that combine a commercial and social development logic be better understood.

Another domain of research that remains to be developed is at the intersection of research on institutional entrepreneurship and research on change agency. As previously mentioned, institutional entrepreneurs are a category of change agent, distinguished from other change agents in that the changes they initiate *diverge* from existing institutions in a field of activity. We need to better understand the specificities of the strategies used by institutional entrepreneurs relative to those used by other change agents (who implement non-divergent changes). Owing to the divergent nature of the changes they implement, do institutional entrepreneurs need more time and capacity as well as resources and skills? If so, how much and which ones? It would also be interesting to investigate whether the variables that influence the outcomes of the change process are similar for divergent and non-divergent changes. But comparative research on change initiatives should not be limited to divergent and non-divergent change; also needed is a more fine-grained understanding of the concept of divergent change. Rather than rely on a dichotomous approach that contrasts divergent and non-divergent change, recent research measures the extent to which changes diverge from the institutional contexts within which they are implemented (Battilana, 2007). We also need to further explore the nature of divergent change. Are there different categories, and, if so, what are the antecedents of the different types of divergent change? Battilana (2007) shows, for example, that different types of divergent change are likely to be initiated by institutional entrepreneurs who occupy different social positions in a field.

Finally, institutional entrepreneurship is likely to contribute to the ongoing interaction between organizational theory and research on social movements (Davis, Morrill, Rao, & Soule, 2008). The latter provides a framework for analyzing large-scale institutional changes and shares several major assumptions with research on institutional entrepreneurship. Schneiberg and Lounsbury (2008) find the two approaches to share views about embedded agency and show how agents draw upon existing institutions to create new ones, as well as identify as critical to change some of the same processes including framing, theorization, transposition, and the recombination of logics. But whereas research on institutional entrepreneurship tends to concentrate on specific agents, research on social movements places greater emphasize on collective mobilization. This suggests that each approach might contribute to the development of the other. Research on institutional entrepreneurship might contribute to a better understanding of how some agents get to spearhead and organize social movements, thereby bringing a more micro view to this macro and structural perspective. As we already discussed earlier, research on social movements might in turn contribute to research on institutional entrepreneurship, by helping to fill a gap in the existing literature related to the complex collective action that follows institutional entrepreneurs' actions.

Expanding the Methods

To explore the new research directions presented earlier, the methods used to study institutional entrepreneurship will need to be expanded. The discursive dimension occupies center stage in the current literature on institutional entrepreneurs' strategies (Creed et al., 2002; De Holan & Phillips, 2002; Fligstein, 1997, 2001; Maguire et al., 2004; Rao, 1998; Rao et al., 2000). Current research privileges discourse analysis in its various forms including critical discourse analysis (Munir & Phillips, 2005), narrative analysis (Zilber, 2007), framing analysis (Creed et al., 2002; Rothenberg, 2007), and rhetoric (Suddaby & Greenwood, 2005). Some researchers even propose that institutional entrepreneurship is mainly a discursive strategy whereby institutional entrepreneurs generate stories, discourses, and texts aimed at affecting the processes of social constructions that underlie institutions (Morrill & Owen-Smith, 2002; Munir & Phillips, 2005; Phillips et al., 2004). Acknowledging the importance of discourse in communicating, and mobilizing people behind, a vision for divergent change, we nevertheless argue for taking into account other dimensions of the process of divergent change implementation. Recent efforts to consider such other dimensions as practices (Lounsbury & Crumley, 2007) and material resources (Wijen & Ansari, 2007) call for new methods that complement those focused exclusively on actors' discourse and cognition. Methods drawn from the literatures on communities of practice (Brown & Duguid, 1991; Wenger, 1998), strategy as practice (Chia, 2004; Jarzabkowski, 2004; Whittington, 1996), Bourdieu's (1977) notion of habitus, and actor-network-theory (Callon, 1986; Latour, 1987) might provide interesting insights into practices and material elements that could complement the ideational emphasis of institutional theory.

Another important methodological issue is the need for comparison. Empirical research thus far has been reported largely in monographs on successful institutional entrepreneurs in organizational fields. Most studies are process analyses of institutional entrepreneurship based on single, in-depth, longitudinal case studies (De Holan & Phillips, 2002; Garud et al., 2002; Munir & Phillips, 2005). This approach has yielded valuable insights, but within limits. To assess these insights and develop others, we need to move beyond idiosyncratic research. Yet, multi-case comparative research remains rare (for exceptions, see Boxenbaum and Daudigeos (2008), Lawrence et al. (2002) and Rothenberg (2007)). Although much could be learned by comparing successful institutional entrepreneurs with failed ones, research thus far has focused almost exclusively on the former. Failure cases are, in fact, more difficult to detect and study in retrospect, but this situation introduces a strong bias in our understanding of institutional entrepreneurship. It also hinders our ability to identify which combinations of factors correlate most closely with successful outcomes of divergent change. A method such as qualitative comparative analysis (Fiss, 2007; Ragin, 2000) seems well-suited to examining which combinations of variables lead to specific outcomes—in terms of the emergence of institutional entrepreneurs, the process of divergent change implementation in which they engage, and the diffusion processes to which they might contribute.

There is also a need for studies that systematically compare the actions undertaken by institutional entrepreneurs who implement divergent changes with those usually undertaken by change agents implementing non-divergent changes. Finally, it seems important to develop finer-grained analyses that will account for the actions and values of all of the agents involved in the process of shaping institutions. To the extent that institutional entrepreneurship evokes a complex political process, it is necessary to document the actions of institutional entrepreneurs and their collaborators as well as the actions of those who oppose them (DiMaggio, 1988; Lawrence & Suddaby, 2006).

Conclusion

We present institutional entrepreneurs as actors who introduce changes that diverge from existing institutions in a given environment. We highlight specific challenges faced by institutional entrepreneurs who attempt to create, and try to mobilize people behind, a vision that induces them to adopt unfamiliar templates of action that break with existing institutions in a particular context. We further outline how this conception of institutional entrepreneurs differs from, yet overlaps with, some forms of entrepreneurship including social entrepreneurship as well as with some forms of change agency. We also trace the origins of institutional entrepreneurship, and place the concept in the context of organization theory. Our elaboration of the controversy surrounding agency in institutional change highlights the tension between the notion of actors as strategic agents and the powerful influence of institutional forces on human agency. Termed the paradox of embedded agency, this tension—one of the most important challenges facing contemporary institutional theory—might find its resolution in the notion of institutional entrepreneurship as long as it accounts for actors' embedded agency.

Research on institutional entrepreneurs has been instrumental in restoring agency as a central issue in, and to some extent shaping the evolutionary path of, institutional theory. This approach is consistent with DiMaggio's (1988) insistence, in his seminal article on institutional theory, on the importance of agency. The contribution of research on institutional entrepreneurship is not limited to institutional theory. A number of research traditions including research on change, entrepreneurship, social entrepreneurship, and social movements have been, or potentially could be, enriched by the stream of research on institutional entrepreneurship, which in turn would also benefit from these other streams of research. More broadly, because it aims to understand how individual and organizational actors might contribute to changing the institutional environment in which they are embedded despite institutional pressures toward stasis, research on institutional entrepreneurship contributes to the field of organization theory by reviving its mandate to attend to the role of organizations and individual actors in the larger social system (Hinings & Greenwood, 2002; Parsons, 1956; Stern & Barley, 1996). This revival is crucial at a time when we are trying to understand the failure of, and face the difficult challenge of reforming, some of our institutions including markets. How the social system influences organizational behavior and how individual and organizational actions can affect the social system, are precisely what we need to understand at this juncture. A better understanding of embedded agency might enable actors to influence more effectively the direction of change and thereby favor more desirable institutional change. We agree with those who maintain that institutional theory stands the best chance of arriving at such understanding (Davis & Marquis, 2005; Kanter & Khurana, in press), but it will do so only if it leverages the stream of research on institutional entrepreneurship including synergies with related research traditions. Because institutional change is a highly complex and uncertain process, the outcome of which is difficult to predict, we should devote additional effort to trying to understand better how actors can initiate and implement divergent change. By doing so, institutional scholars will inform our understanding not only of the institutional origins of a crisis such as the one that we are currently facing, but also of how actors, in particular, policymakers, might reform institutions.

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Endnote

1. We examined research on institutional entrepreneurship from 1988, the year DiMaggio's book chapter brought the notion into organizational analysis, onward. We searched the EBSCHOT Business Source Premier and JSTOR databases for entries in peer-reviewed journals that contained in the title, abstract, keywords, or full text at least one of the following keyword phrases: institutional entrepreneur or institutional entrepreneurship. This procedure generated more than 100 articles. Excluding editorials, calls for papers, and articles that made reference to the terms only in passing or referred to other meanings or theories (e.g., economic approaches such as transaction cost analysis) left us with more than 60 articles published in refereed publications. We then used the reference lists of the selected articles to identify recurrent references published in journals not included in the database as well as book chapters.

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