Review Article

The Methodology/Theory Interface: Ethnography and the Microfoundations of Institutions

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Abstract

I explore the interrelations between methodology and theory by examining how specific research strategies afford specific lines of theorizing. My case study is recent studies in which scholars applied ethnography to examine the microfoundations of institutions. I show how ethnography – a research method designed to study actions, interactions, and the fine details of the here and now as these are articulated in the context of shared cultural meanings – was deployed through four different research strategies, including (a) zooming-in on micro-dynamics of a documented macro process; (b) exploring the micro patterns of an institutional problematics; (c) focusing on pivotal institutional moments; and (d) inquiring into micro-dynamics in specific institutional locations. Each of these research strategies affords specific ways to theorize the connections between the micro and macro in institutional processes. My exploration may serve as a road map for the ethnographic study of institutions' microfoundations and other macro phenomena, as explicating the theoretical affordances of research strategies may help researchers in making more informed choices about the method/theory interface. More generally, it highlights the need – well established yet often neglected – to explore more deeply the interplay between method and theory, and how seemingly technical methodological choices bear profound theoretical implications, both for each study and for the discipline as a whole.

Keywords

ethnography, methodology and theory, micro–macro divide, microfoundations of institutions, qualitative research strategies, research methods

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Theorizing is closely linked to methodology, for 'how we come to know social reality has strong effects on how we theorize about this reality' (Delbridge & Fiss, 2013, p. 328). Theory is based on data from the empirical world. Still, it is always mediated and shaped by the methods we use to collect data, the specific data collected, and our ways of analysing and explaining this empirical data (Cornelissen, 2017; Van Maanen, Sørensen, & Mitchell, 2007).

Commonly, scholars learn a specific set of legitimate methods and tend to use them regularly in all their research projects. Thus, phenomena that these methods fail to capture will readily be ignored (Meyer, Gaba, & Colwell, 2005). Furthermore, 'training and socialization into those methods prefigures particular ways of thinking about and writing theoretical explanations' (Cornelissen, 2017, p. 370). The more we restrict the variety of methods we use, the more we lose in the diversity of possible ways of explaining (or constructing) reality (Cornelissen, 2017; Schneiberg & Clemens, 2006).

Reflexivity about methodological choices and their theoretical affordances is thus crucial for theory development. Reflection means giving 'serious attention' to the way 'different kinds of linguistic, social, political and theoretical elements are woven together in the process of knowledge development, during which empirical material is constructed, interpreted and written' (Alvesson & Sköldberg, 2000, p. 5). Such an explicit discussion can help to develop a varied set of methods that will nurture diverse ways of theorizing, which will widen and deepen our constructions of the world. Such reflexivity will allow researchers to make informed methodological decisions – ones that take into account their implications for theorizing – about specific research strategies for data collection and analysis.

I tackle the interrelations between methodology and theory by focusing on how ethnographic methods are used to study the microfoundations of institutions. In recent years, a tectonic move towards the study of the microfoundations of broader social processes is changeing the landscape of organization studies. This move is apparent in several different theoretical conversations, from strategy (Foss & Pedersen, 2016) to accounting (Power, 2020) and institutional theory (Haack, Sieweke, & Wessel, 2020), and it has been articulated in other disciplines as well, including sociology, anthropology and economics (Felin, Foss, & Ployhart, 2015). While 'microfoundations' may be understood in different ways (Haack et al., 2020), for me, the main question is 'how the interactions of individuals lead to emergent, collective' higher-level outcomes (Felin et al., 2015), and how those very interactions are structured by macro-level forces. Hence, studies of microfoundations strive to explore the 'black boxes' within macro-level models (Barney & Felin, 2013; Powell & Rerup, 2017), like organizational structures, strategy and fields. Questions about such black boxes – how social structure is constituted by human interactions (Soderstrom & Weber, 2020), how strategy is constructed by daily routines (Felin & Foss, 2009) or how fields are shaped by mundane practices (Smets, Morris, & Greenwood, 2012) – cannot be answered at the level of a macro-structure, strategy or field alone (Power, 2020), nor can they be answered on the level of the micro alone.[1] In essence, this is a theoretical question – how the macro–micro interface is worked out – and it invites methodological considerations on how to explore this dynamic interrelation.

I focus on institutional theory as an extreme case. Institutional theory, as developed throughout most of the last 40 years, is concerned with longitudinal processes on the macro level. Thus, the challenge of studying the micro level and connecting it convincingly to the macro institutional level is especially demanding (Barney & Felin, 2013; Felin et al., 2015; Meyer & Höellerer, 2014; Selznick, 1996).

There are philosophical and theoretical discussions of the micro–macro distinctions and links (e.g. Coleman, 1990; Collins, 1981; Ramstrom, 2018a, 2018b) and review papers of the microfoundation movement (e.g. Felin

et al., 2015; Foss & Pedersen, 2016). To the degree that methodology is discussed, standard methodological recipes are based on quantitative or mixed methods (e.g. Aguinis & Molina-Azorin, 2015; Greckhamer, 2012; Raub, Buskens, & van Assen, 2011). We are still missing explorations of the methodological choices involved in studying the microfoundations of macro-level dynamics and their theoretical affordances, especially when it comes to qualitative studies. Thus, my review goes beyond the analytical emphasis of past work and focuses on the theoretical affordances of particular methods to get at 'microfoundations'.

I focus on ethnography as a prime qualitative method that aims at joining and observing people, their behaviours, understandings and interactions in natural settings (Locke, 2011). Ethnography is deemed especially suitable to explore microfoundations of institutions (Barley, 2019; Haedicke & Hallett, 2016; Nicolini, 2009). Yet, given that ethnography is focused on the here and now, the challenge of linking micro phenomena to macro-level processes is daunting. How do you go about designing a micro-level qualitative study of a macro-level phenomenon, and how do you analytically connect the two levels convincingly? How do you make sure this is a study of microfoundations of a macro-level process rather than merely a micro-level phenomenon in and of itself?

There are different ways to deploy ethnography, and each specific deployment – research strategy – affords certain theorization. Drawing upon a review of recent empirical studies, I discuss four specific research strategies that use ethnography – solely, or in conjunction with other methods – to study the microfoundations of institutions, and highlight their theoretical consequences. I begin with a review of how methodological preferences changed in tandem with the movement between levels of analysis in institutional theory, and the various conceptualizations offered to explain the microfoundations of institutions. Next, I describe why and how I used ethnography as a selection criterion for my review, and situate ethnography within

its paradigmatic – constructivist-process ontology – context. I then outline four research strategies that use ethnography: zooming-in on micro-dynamics of a documented macro process; examining micro patterns of institutional problematics; capturing institutional dynamics in pivotal moments; and inquiring into the microdynamics in institutional locations. These strategies tackle the conundrum of connecting an exploration of the here and now with a broader collective social process in different ways with different theoretical implications. Each of these strategies thus allows a specific take in theorizing the microfoundations of institutions.

My review of recent ethnographic studies of the microfoundations of institutions is not a standard one. Rather than focusing on how researchers theorize the microfoundations of institutions, I ask how researchers approach the study of the microfoundations of institutions, specifically how their method choices affect and direct their theorizing. I aim to open an explicit and reflexive discussion on how various research strategies allow theorizing the connection between micro and macro in institutional dynamics, as an example for the larger interest in how methodology and theory are intertwined (Delbridge & Fiss, 2013; Van Maanen et al., 2007).

The Interplay of Method and Theory in the Development of Institutional Theory

The development of institutional theory within organization studies is marked by the move between levels of analysis. 'Macro' and 'micro' are relative terms: 'everything is micro to something and macro to something else' (Harmon, Haack, & Roulet, 2019, p. 465). The meaning of micro and macro, and the analytic benefits of using these terms, depends on specific theoretical and disciplinary contexts (e.g. Krause, 2013). Notwithstanding discussions around the problematics of 'flat' and 'tall' ontology (Nicolini, 2017; Seidl & Whittington, 2014), differentiating between 'levels' of the social is

useful analytically. Thus, I use them here pragmatically – in some instances, individuals and groups serve as the micro-level of organizations; other times, organizations serve as the micro-level of field or societal level studies (Molloy, Ployhart & Wright, 2011).

Past theoretical and methodological trajectories

Now a central stream within organization studies (Greenwood, Oliver, Lawrence, & Meyer, 2017; Greenwood, Oliver, Sahlin, & Suddaby, 2008), the origin of institutional theory lies in the 'old' institutional school. It explored micro-level interactions between people, groups and organizations, including the ways they constitute broader social processes and are affected by them (Berger & Luckmann, 1966); Meyer & Rowan, 1977; Selznick, 1949; Zucker, 1977). The 'new' institutional school (DiMaggio & Powell, 1991) took a sharp turn to the macro level, framing its main theoretical contribution in arguing that organizations are constantly subjected to compelling institutional pressures coming from the outside. Organizations adopt and imitate those practices deemed legitimate in the institutional order. The micro level was thus understood to mirror the macro level; studying the micro became somewhat redundant. Further, following influences of Durkheimian sociology, empirical studies explored and explained institutional dynamics at the macro level – fields, societies and the world polity (Scott, 2014) – privileging 'macro explanations and macro-to-macro relations, as well as macro-to-micro links' (Barney & Felin, 2013, p. 139; and see Barley, 2008; Felin et al., 2015; Hallett & Ventresca, 2006). While many institutional studies still explore the macro-level dynamics of institutions, a growing number of scholars (re) turn their research gaze towards the micro level.

These changing foci, in terms of the levels of analysis, went in tandem with methodological preferences. Institutional theory proposed a culturally oriented conceptualization of social life that stood in contrast to the then-dominant theoretical explanations based on individuals'

behaviours and economic assumptions. Yet, methodologically, it conformed with the positivistic or post-positivistic tendencies of the period and the discipline (Amis & Silk, 2008; Locke, 2011). Most studies were based on large archival datasets, studying, for example, world-polity/national-policy, and fields/firms interfaces (Schneiberg & Clemens, 2006). While developing new and sophisticated statistical methods to appreciate how higher-order factors influence social actors' behaviour, it fell short of capturing culture directly, in all its diversity and richness (Schneiberg & Clemens, 2006). Most research projects embodied then a 'dissonance between the innovative status of some of the theoretical ideas of neo-institutionalism and the conventional character of the empirical programme' (Hasselbladh & Kallinikos, 2000, p. 698).

To capture culture more directly, and theorizing about its work in institutional dynamics, institutional scholars needed to extend their methodological toolkit. One set of tools was borrowed from discourse analysis. As in other cases, a methodological choice comes with an analytical shift towards new theorizing of the object of study itself. Hence, institutions were reconceptualized as discourses, constituted through the production, dissemination and consumption of texts (Phillips, Lawrence, & Hardy, 2004). This textual activity leaves very rich traces, as

> actors rarely, if ever, remain silent as they make policy or build regulatory regimes. They think, meet, argue, make claims, define options, conduct studies, tell stories, and generate discursive output, including reports, interviews, minutes, and newspaper commentaries. In producing this output, actors reveal how they perceive problems and make (or fail to make) connections among concepts, objects, and practices. They also articulate models, fairness principles, and criteria for reasonableness or efficiency.

Thus, the world is 'full of both archives and people engaging in discourse' (Schneiberg & Clemens, 2006, pp. 210–11), and discursive institutionalism finally developed the tools to utilize

these kinds of data to learn about institutional processes. Using discursive methods to examine institutional dynamics had significant theoretical implications. It allowed scholars to see in particular 'heterogeneity' and not only convergence in institutional processes. 'Such appreciation of heterogeneity and the relative incoherence of fields' was crucial for a new focus on institutional change, and more generally 'for moving beyond the analysis of institutional effects to an examination of processes of institutional transformation' (Schneiberg & Clemens, 2006, p. 210).

Most empirical studies, however, explored decontextualized discourses or 'discourse in the abstract' (Hacking, 2004), focusing on the texts themselves – discourses, framings and rhetoric – to the neglect of the actors and interactions that constitute them (Leibel, Hallett, & Bechky, 2018). Thus, institutional scholars were still limited in theorizing processes of emergence (Colyvas & Maroulis, 2015), in appreciating the political aspects of institutional dynamics (Munir, 2015; Munir, 2019) as well as in taking into account multimodalities beyond words like emotions, materiality and the body (Zilber, 2018). Emergence, power relations and multimodalities were 'omitted or masked' by the kinds of methods, data and analysis deployed (Hudson, Okhuysen, & Creed, 2015, p. 233).

The (re)turn to microfoundations

The change of empirical and theoretical focus from macro-level outcomes and processes to micro-level processes and how they relate to the macro level has been developing in the past 20 years. Within institutional theory, the so-called microfoundations movement redirects attention from world polity, societal or the field level alone towards organizational, intra-organizational and individual levels of analysis.

Conceptually, this theoretical and empirical work has been developing through a multitude of labels – institutional work (Lawrence & Suddaby, 2006), inhabitant institutions (Hallett & Ventresca, 2006), microfoundations of institutions (Powell & Colyvas, 2008), coalface institutionalism (Barley, 2008), practice driven

institutionalism (Smets, Aristidou, & Whittington, 2017) and communicative institutionalism (Cornelissen, Durand, Fiss, Lammers, & Vaara, 2015). While each of these conceptualizations is grounded within different intellectual traditions and onto-epistemology, and illuminate different understandings and aspects of the microfoundations of institutions, I highlight here their similarities and the aggregated depiction of institutions they offer. Taken together, the return to the micro level within institutional theory points to three 'intimate insights' (Cloutier & Langley, 2013, p. 369) into the factors that participate in the work of institutions – actions ('work' or practices), interactions and actors.

Exploring the microfoundations of institutions entails a focus on concrete action – from institutional entrepreneurship (DiMaggio, 1988) to institutional work (Lawrence & Suddaby, 2006) to practices (Smets et al., 2017), the interest is in everyday, mundane activities of individuals (Powell & Colyvas, 2008).

Actions, however, are executed, understood, complemented or resisted within interactions, the 'beating heart of institutions' (Hallett & Ventresca, 2006, p. 215). Microfoundations of institutions cannot be understood from an overly individualistic and cognitive perspective alone, but rather from looking at communication as well, analysing thus 'social interaction that builds on speech, gestures, texts, discourses, and other means' (Cornelissen et al., 2015, p. 11). The study of 'dynamics and dialectics in action, not as a finished, closed history' (Hacking, 2004, p. 278) requires going beyond words and exploring the social exchanges by which these words become meaningful and consequential.

Given the importance of actions and interactions, the very understanding of agency and agents within institutional jurisdictions has changed. Whereas macro-level approaches highlighted the deterministic power of institutions over their constituencies, with time, 'research has become increasingly concerned with the effects of individual and organizational action on institutions' (Lawrence & Suddaby, 2006, p. 216). Further, the understanding of who

actors are has been expanding. Not only 'leaders or champions', but 'less powerful members of organizations' became worthwhile to study (Powell & Colyvas, 2008, pp. 277–8). Their capacity for an agency 'is seen to be embedded in the ever-present set of tools for justification that competent actors have at their disposal, and is thus mutually constitutive with structure' (Cloutier & Langley, 2013, pp. 371–2).

Studies of the microfoundations of institutions are not about the micro level alone but rather about the ways the micro is tied with the macro. They are informed by sociological, not psychological, sensibilities. While focusing on people and their actions and interactions, the only way to make sense of them is by situating them within their broader context (Hallett & Ventresca, 2006) as 'all action is situated within, produces and reproduces the dynamics of its wider social context' (Jarzabkowski, Smets, Bednarek, Burke, & Spee, 2013, p. 358). As Barley (2008) phrased it, 'action always occurs within the constraints of an institutional matrix that human wittingly or unwittingly create, maintain, and alter' (p. 495). Just as 'micro-level rituals and negotiations aggregate over time' and build up institutions, 'macro-orders are pulled-down, and become imbricated in local or particular cases, situating macro-effects inside organizations and individuals. Both streams are vital to building microfoundations for institutional theory' (Powell & Colyvas, 2008, p. 278).

The multitude of calls for the study of microfoundations of institution promises to invigorate institutional theory by putting at centre-stage people, actions and interactions. Further, there is a broad agreement that such a refocus on the microfoundations of institutions is only achievable by extending our theoretical toolkit to include approaches developed outside institutional theory that are better equipped to explore the micro-level. Among them are, the sociology of practice, symbolic interactionism, Goffman's interaction rituals and frame analysis, ethnomethodology, performativity, sensemaking, the Chicago school of sociology, French pragmatist and theories of communication and

interaction. The move towards the micro level also necessitates an extension of legitimate research methods, to which I now turn.

Methodological Avenues for Studying the Microfoundations of Institutions

The conceptual groundwork regarding the microfoundations of institutions is well elaborated. By contrast, only a few attempts have been made to explicate its methodological aspects. I build on, and extend, these efforts concerning qualitative methods (e.g. Lawrence & Suddaby, 2006, pp. 238–46; Haedicke & Hallett, 2016; Hallett & Ventresca, 2006, pp. 228–30). Most generally, I ask: what research methods were used to study the microfoundations of institutions, and what are their theoretical implications? I used ethnography as a selection criterion for choosing studies to be reviewed. In the following, I explain what I mean by ethnography and why I focus my analytical review around it.

Ethnography

While ethnography has many varieties (Locke, 2011), I refer here to two of its 'analytical sensitivities' (Locke, 2012). First, ethnography involves collecting data *in situ* and *in vivo*, capturing thoughts, actions and interactions between people as they unfold naturally in real life (Locke, 2012; Nicolini, 2009). *In vivo* and *in situ* field material – collected through ethnographic observations or interviews – is much richer than retrospective accounts in interviews (Barley, 2019). Direct observations and accounts allow capturing actual interactions, and not only their textual traces (Leibel et al., 2018). Second, and at the same time, ethnography allows capturing these micro details in their historical and social context (Bate, 1997). As Blommaert (2007, p. 682) argued, a

> good ethnography is *iconic* of the object it has set out to examine, it describes the sometimes

chaotic, contradictory, polymorph character of human behaviour in concrete settings, and it does so in a way that seeks to do justice to two things: (a) the perspectives of participants – the old Boasian and Malinowskian privilege of the 'insiders' view'; and (b) the ways in which micro-events need to be understood as both unique and structured, as combinations of variation and stability – the tension between phenomenology and structuralism in ethnography.

'Our lives,' wrote Biehl (2013, p. 574)

> are part and parcel of small- and large-scale milieus and historical shifts coloring our every experience. (. . .) As ethnographers, we are challenged to attend at once to the political, economic, and material transience of worlds and truths *and* to the journeys people take through milieus in transit while pursuing needs, desires, and curiosities or simply trying to find room to breathe beneath intolerable constraints.

Ethnography is about the study of situated action within its broader context, about connecting 'local' and 'translocal' realities (Smith, 1990, 2005). It

> attends to unfolding action within the institutional and cultural contexts in which it takes place – the way in which things, people, and actions already matter in specific though evolving ways – but it also brings them together with the everyday talk and interaction that both draws on and produces these contexts. (Locke, 2012, p. 279)

I examined articles that use ethnography – solely, or in tandem with other research methods – to explore microfoundations of institutions,[2] for two reasons. First, ethnography – both the method and the paradigmatic stand within which it is embedded – offers a compelling 'theory-method package' (Nicolini, 2009) that have specific theoretical promises for the current study of microfoundations. Second, ethnography brings to the extreme the challenge in studying social dynamics in fine detail, while also succeeding in connecting these micro details to the macrostructure and process.

Theorizing from ethnography

In real-time, institutional dynamics – which only retrospectively may be termed institutionalization, institutional change or deinstitutionalization – are messy. They involve many different people who interact with each other and perform many different actions. They are unpredictable – there is no way to determine, in advance, which actors will turn out to be most influential; people themselves do not necessarily know which actions will turn beneficial. Whatever actors, interactions and actions are involved, everybody is busy interpreting and giving meaning to their acts and the acts of others (Migdal-Picker & Zilber, 2019), struggling to do what they think will further their interests.

Macro-level studies, both qualitative and quantitative, opt to reduce this richness (unintended consequences, the way understandings and feelings impact behaviours, and the complex interactions between actors and their actions) to allow the generation of causal process models. They strive to offer 'a syntactic explanation (. . .) providing a broadly applicable structure or system' (Cornelissen, 2017, p. 371). The ethnographoic study of microfoundations aims at another methodological/theoretical compromise, closer to the one common in qualitative research (Guba & Lincoln, 1994; Van Maanen, 1998, pp. xi–xiii) and especially in ethnography. Building on a 'strong process ontology', it focuses on process-as-narrative or process-as-activity (Fachin & Langley, 2017). It acknowledges that all actors, actions and interactions are 'subordinate to and constituted by process' (Langley, 2009, p. 410). Such process ontology is also constructivist (Guba & Lincoln, 1994), holding that reality is not objective but instead constructed, through local and social processes of meaning-making. Rather than trying to 'reduce the complexity of social events by focusing *a priori* on a selected range of relevant features, (. . .) it tries to describe and analyze the complexity of social events *comprehensively*' (Blommaert, 2007, p. 682). Thus, the study of ongoing processes can only be achieved by attending to the rich contexts,

that is, by providing thick descriptions (Geertz, 1973) of behaviours, feelings and understandings, from the actors' point of view, analysing the practices used and the interactions taking place, thus exposing the 'guts' and dynamics of the 'big' process. This understanding (or theorization, if you will) is very different from the one based on logical positivism. Ethnography cannot offer causal models that explain outcomes, but rather after-the-fact interpretations and analytical generalizations (Schwandt, 2001) of the 'world inside' a social process (Lawrence & Suddaby, 2006). Instead of trying to explicate universal principles, ethnography – like qualitative methods more generally – offers a 'semantic explanation (. . .) a deep contextual understanding' (Cornelissen, 2017, p. 371) that makes these universal principles 'understandable in light of specific cases' (Schwandt, 2001, p. xxxi).

The challenge in ethnographic studies of institutional microfoundations

Ethnography offers an excellent paradigmatic-fit to study the microfoundations of institutions, but raises a problem: How does one manage to zoom in and at the same time zoom out (Nicolini, 2009) and look beyond the studied field – to connect with the institutional environment? How and when can we, or should we, see the institutional matrix in situated action? How does one avoid losing the forest (macro) for the trees (micro)? When can we allow ourselves to label a microfoundation study as institutional? This challenge is both theoretical and methodological. Theoretically, it often happens that as researchers focus on the micro level, they borrow from 'micro disciplines' like psychology, and seem to 'restate or repackage insights' from them, rather than using the focus on microfoundations to question and 'extend them into new domains' (Felin et al., 2015, p. 598). In such cases, scholars focus on the intra-organizational level (groups, individuals), while assuming – but not exploring – the institutional level. In this kind of 'big-B' organizational behavior research (Heath & Sitkin, 2001), 'concepts from micro disciplines are

readily borrowed' and applied 'in organizational settings, without any attention to the uniqueness of the actors, behaviors, and interactions within a specific organizational or market context' (Felin et al., 2015, p. 599). Seidl and Whittington (2014, p. 1408) refer to this bias as micro-isolationism, 'whereby a local empirical instance is interpreted wholly in terms of what is evidently present, cut off from the larger phenomena that make it possible'.

Such disregard for the macro level is especially problematic within the study of microfoundations of institutions, given that institutions operate on all levels. What we are missing in the study of microfoundations of institutions is the micro–macro link, failing to connect 'identity, sense-making, typifications, frames, and categories with macro-processes or institutionalization, and show how these processes ratchet upwards' (Powell & Colyvas, 2008, p. 278).

Methodologically, using ethnography does not guarantee a microfoundation analysis, as it is quite a challenge to keep an eye on both the parts and the whole (Kozlowski & Klein, 2000, p. 54). Ethnography is about immersing oneself within the studied 'field'. To achieve a deep understanding of social dynamics, how people experience and understand them, one needs to spend significant time in the 'field'. Thus, ethnography (even more recent multi-sited kinds) is still bounded in time and space. How does one execute an ethnography that combines the local with its broader context? Given that ethnography is full of both potential and challenge for the study of microfoundations of institutions, studies that manage to connect micro and macro institutional dynamics through the use of ethnography serve as an extreme case of sorts (Yin, 1989/2018) in which the analytical moves to connect micro and macro will be more apparent and easier to detect and discuss. Hence, I hope my analysis offers both specific insights regarding the applications of ethnography to study the microfoundations of institutions, and more general ideas about how to unpack method/theory relations in other domains.

Ethnographic Studies of the Microfoundations of Institutions

Four research strategies and their theoretical implications

I identified four kinds of research strategies that highlight the microfoundations of institutions and allow for 'looking both ways at once' (Haedicke & Hallett, 2016): (1) zooming-in zooming-out[3]: zooming in on micro-dynamics of a documented macro process; (2) problematics: examining micro patterns of an institutional puzzle; (3) moments: capturing institutional dynamics in pivotal moments; and (4) locations: inquiring into the micro-dynamics in institutional spaces. Table 1 summarizes these four research strategies and their main features.

Zooming in on micro-dynamics of a documented macro process

The insight at the base of this methodological strategy relates to the different temporalities of the macro and micro levels. Macro-level institutional dynamics are slow and take years to mature. We can only appreciate them as a whole and over time, and for that, we need to use a retrospective design. Micro-level dynamics, by contrast, are very condensed. They are ongoing and ever-present. Their richness and nuances get lost when we look at them retrospectively, yet they are too rich and complex to be followed along institutional periods. The following strategies attempt to 'stretch' the micro-level inquiry.

One research strategy that allows for connecting micro and macro levels is zooming-in on a known or separately studied macro-level institutional process. In this research design, a longitudinal ethnography of sorts, scholars use multiple methods, all qualitative, to attend to both situated action and its broader context. Smith and Besharov (2019), studying one organization over the first ten years of its existence, relied on *in vivo* observations and interviews as well as archival data. While observations were carried out only at the beginning and end of these ten years,

interviews were conducted throughout this period, and archival data covered it all as well. The observations and interviews allowed the authors 'to follow events forward as they unfolded', complementing the data with over 3,000 archival documents, 295 of which were most relevant. This strategy allowed them to fill the gaps in the *in vivo* data, and 'trace events backward' as well (p. 5). In their analysis, they created a rich case study based on all the data. Initial insights – that participants understand their reality as containing a tension between the organization's business and social mission – directed further analysis, examining how the organization's leaders enacted those missions. Since leaders seemed committed to both tasks, yet experimented with different interpretations and practices thereof, the researchers started to 'focus in more depth on what shifted and what remained stable over time' (p. 7). Reexamining the data temporally, they identified three periods, characterized by specific shifts in meanings and practices. Then, they zoomed in on each era, to 'unpack the processes associated with adaptation in meanings and practices' (p. 8). The long time-window they covered by conducting interviews and collecting archival text, accompanied by zooming into the micro-level happenings, allowed them to offer a process model depicting how intra-organizational dynamics sustained organizational hybridity. Thus, the detailed mechanisms of what they termed 'structured flexibility' are not merely micro-level dynamics in themselves, but amount to the microfoundations of institutional maintenance.

It is not always possible to collect *in vivo* data along time, as Smith and Besharov (2019) did (also Lawrence, 2017; Smets et al., 2012). The difficulty in capturing the beginning of institutional processes is probably why most ethnographic studies of the microfoundations of institutions start 'in the middle'. Most studies use ethnographic observation in the here and now, and complement them with archival data and retrospective interviews, to stretch the period as much as possible and thus capture the institutional process within which these observations are meaningful. Mair and Hehenberger (2014), for example, studied the field of venture

Table 1. Ethnography and microfoundations of institutions: Main features of different research strategies.

	Zooming-in zooming-out	Problematics	Moments	Location
Description	Combining longitudinal and *in vivo* time perspectives to account for situated action within its institutional context	Theoretical concepts guide case selection, data collection, and analysis in order to tackle an institutional problematic	Exploring a significant point in time or using a cross-sectional design to capture institutional dynamics at its extreme	Examining condensed spaces and locations that are known to be institutionally significant, to capture institutional dynamics within them
Case selection	Longitudinal dynamics: change, emergence, maintenance	Distinctive dynamics: logics complexity, translation, work	Strategic moments: known crisis, planned change, identified crossroad	Space: field-configuring events, trans-organizational structures
Methods	– Observations and interviews at certain moments – Retrospective interviews – Archival texts of entire time span	– Observations – Interviews – Archival texts	– Observations – Interviews	– Observations – Interviews
Time-span	Long (years)	Long or short (days, weeks or months)	Short	Long or short
Analysis	A process over time Zooming-in into temporal eras	Abductive inference	Happenings before, during and after moment	Dynamics in specific spaces
Examples	Dacin, Munir, & Tracey 2010; Fan & Zietsma 2017; Grodal 2018; Grodal & O'Mahony 2017; Hallett & Meanwell 2016; Hardy & Maguire 2010; Lawrence 2017; Maguire, Hardy, & Lawrence 2004; Mair & Hehenberger 2014; Schüßler, Rueling, & Wittneben 2014; Smith & Besharov 2019; Zilber 2002	Christiansen & Lounsbury 2013; Fan & Zietsma 2017; Jakob-Sadeh & Zilber 2019; McPherson & Sauder 2013; Pallas, Fredriksson, & Wedlin 2016; Smets et al. 2015; Smets, Morris, & Greenwood 2012; Toubiana & Zietsma 2017	de Rond & Lok 2016; Hazan & Zilber, 2019; Heaphy 2013; Kellogg 2009; Lok & de Rond 2013	Gross & Zilber 2020; Lawrence & Dover 2015; Mair & Hehenberger 2014; Ruebottom & Auster 2018; Zilber 2007; Zilber 2011

philanthropy in Europe. The main period of data collection took place between 2006 and 2010, through 'observations at events across Europe (conferences, workshops, informal meetings) to capture the social dynamics between actors advocating different models of giving' (Mair & Hehenberger, 2014, p. 1178). The researchers complemented these observations with retrospective interviews and by collecting archival data that covered the period before the study (1990–2006) and after the 'primary fieldwork' (2010–2012). Based on their immersion in the field of European philanthropy, and the emerging insights from the fieldwork, Mair and Hehenberger (2014) focused on the convening of events. Specifically, they looked at how the construction of differential spaces – front stage in conferences and backstage in workshops – affects the kinds of interactions that take place within them. Not every study of interactions amounts to a study of microfoundations of institutions. Mair and Hehenberger (2014) situated these interactions within a process of institutional change – change between models of philanthropic giving in Europe, which they identified using the archival data and retrospective interviews. The choice of events to be studied, and the focus on the micro level of the interactions, are justified, as these events were central to the field's trajectory. Thus, Mair and Hehenberger (2014) were able to use the events as 'empirical windows to detect field transition' (p. 1181). Using immersion in the field and direct observations of interactions to zoom in on the relevant events and the interactions they foster – in the context of field-level transition between two ways of giving – makes this study a convincing example of studying microfoundations of institutions (for similar research design, on the organizational or field levels, see Dacin et al., 2010; Fan & Zietsma, 2017; Grodal, 2018; Grodal & O'Mahony, 2017; Hardy & Maguire, 2010; Maguire et al., 2004; Schüßler et al., 2014; Zilber, 2002).

Zooming-in onto the microfoundations of a macro-level institutional process can also be achieved by building on already-documented institutional processes. Hallett and Meanwell (2016), for example, used a unique dataset to explore the interactions at the basis of accountability reform in USA schools, centred on the No Child Left Behind law, passed in 2002. In the years after, there were several attempts to change the code, culminating in a new law in 2015. The study centres on 20 congressional hearings that took place in 2007 which were an important crossroads in the trajectory of this long process of policy reform. The data consists of verbatim transcripts of these congressional committee hearings. In qualitative studies of institutions, such texts are usually analysed as expressions of frames, discourses or rhetoric (Leibel et al., 2018). By contrast, building on inhabited institutionalism (Hallett & Ventresca, 2006), the authors analysed them as interactions. Thus, while this is not an ethnographic study in the traditional sense, the data allowed them to zoom in and explore the negotiations over meanings through interactions that underlie and explain the macro-level process of policy reform. Given that the study took place after the policy-making process ended with a new and 'weaker' law, the authors knew its outcome. They could thus read the *in vivo* data within its broader context, and connect successfully micro-level interactions with the macro-level process.

Zooming-in and zooming-out is made possible by collecting longitudinal (usually retrospective) data (interviews and archival texts). The date allows researchers to identify an institutional process (institutional change, maintenance or emergence), and then combine it with *in vivo*, micro-level data that enables them to uncover the 'internal life' (Brown & Duguid, 2000) of the process. By collecting both 'inside' ethnographic field material and voluminous 'outside' qualitative data, scholars manage to explore the microinstitutional phenomenon in its context (Haedicke & Hallett, 2016). In particular, the longitudinal data allows researchers to identify 'critical incidents' of 'institutional phenomena in action' which they can drill 'deep into' while also appreciating them as 'embedded and longstanding patterns of social order'

(Jarzabkowski et al., 2013, pp. 366–7). The macro-level institutional process may be part of the ethnographic study itself, or well documented in previous studies.

Examining the micro patterns of an institutional problematic

When asking theoretical questions about institutionalization, some researchers choose to focus on the here and now, instead of covering the entire process. In such instances, they need to take particular care to ensure that the problematic they are trying to explore is, in fact, inherently institutional. Every micro-action is 'institutional' in that institutions govern and affect all constituencies within their jurisdiction, including mundane actions, interactions and even individuals' thoughts and emotions. Every interaction involves collective understanding and shared cultural meanings that people implement and negotiate, and which enable and guide the interaction. Indeed, the 'exchange between people' links micro and macro environments (Stowell & Warren, 2018, p. 788). Yet, in this broad sense, the 'institutional' loses its decisive analytical grip. As Meyer and Höellerer (2014, p. 1230) argue, 'not every puzzle can – or should – be solved with an institutional explanation'. At times institutional concepts are merely used 'to signal membership in a certain research community, rather than indicating the actual study of institutions'.

Simply highlighting (or just assuming) that macro institutional forces shape micro-level behaviour does not make the study a worthwhile 'institutional' study. By contrast, institutional 'problematics' are those questions that allow us to extend and deepen our understanding of institutional dynamics. For example, how employees within organizations go about doing their work is not an institutional problematic. Yet, if this work is directly involved in the creation, change or maintenance of institutions (Lawrence & Suddaby, 2006), or what Barley (2019) calls 'working institutions', then the institutional puzzle is more readily apparent and theoretically interesting. As Smets and

colleagues (2017, p. 401) put it, one needs to avoid the 'burger-flipping problem of obsession with the trivialities of food mass-production. . . . The micro activity of burger-flipping is important to the extent that it reveals something about the more extensive practices of, for example, McDonaldization.' Only those micro-level dynamics that can be explicitly, specifically and persuasively associated with the institutional order are worth pursuing when exploring the microfoundations of institutions.

Some questions are readily institutional, in that they are based on institutional understanding. Such shared understandings make deep sense within an institutional framework. An example is how people within organizations reconcile contradictory demands (institutional logics) while doing their work, and how such maneuvring illuminate how institutions work (or what are institutional logics). This is an institutional problematic, for the work of logics, its complexity and organizational response is at the core of institutional dynamics (e.g. Greenwood, Raynard, Kodeih, Micelotta, & Lounsbury, 2011; Thornton, Ocasio, & Lounsbury, 2012). Thus, a research project that explores the micro-level dynamics of logics hybridity or bricolage on the organizational (Christiansen & Lounsbury, 2013) or individual (Smets et al., 2015) levels, or how logics work on the ground (McPherson & Sauder, 2013), highlights the microfoundations of institutions.

So is the exploration of other institutional problematics, like translation – the study of the travel of ideas and the structures and practices associated with them across temporal and spatial boundaries (Sahlin & Wedlin, 2008). As translation is one way to conceptualize institutionalization (Czarniawska-Joerges & Sevón, 1996), studies of the micro-level local practices involved in implementing shared cultural meaning, and how they illuminate our understanding of the macro-level process (e.g. Pallas et al., 2016) are also explorations into the microfoundations of institutions.

In some cases, however, ensuring that the study of the micro level amounts to studying the microfoundations of institutions may be more challenging. A case in point is the study of

institutions and emotions, which has attracted much interest recently (Zietsma, Toubiana, Voronov, & Roberts, 2019). Emotions within organizations are not distinctively institutional problematics, and they have been studied in our discipline and other disciplines for decades with no connection to institutions. When, then, does the study of emotions amount to the study of microfoundations of institutions? In order to study the institutions/emotions interface we need to move away from psychological approaches based on 'longstanding (Western) models of the person as a bounded individual, and of the mind as a wellspring of natural impulses' as these 'tend to privilege psychobiological determinants of emotional experience, relegating the role of language, cognition, and social context to marginal status' (White, 2005, p. 241). Rather, we need to broaden our gaze to include sociological (Bericat, 2016; Turner & Stets, 2006) and anthropological (Lutz & White, 1986; White, 2005) conceptualizations and research methods. Breaking free from methodological individualism has been a challenge for the study of institutions more generally, and it is even more so in the study of emotions. To be able to appreciate 'the mutual influences of psychology, culture, and discourse (the things that people say and do in everyday life)', we need to focus on 'patterned contexts of emotional experience', and to 'recognize that emotions are also located within wider spheres of ideology and political structure' (White, 2005, pp. 242–3). Indeed, 'culture', 'discourse', 'ideology' and 'political structure' are, in the lingo of institutional theory, institutions. Yet, how do we capture emotional experiences within a research project, and how do we connect them methodologically to the wider context?

Jakob-Sadeh and Zilber (2019) used ethnography to explore the dynamics of competing institutional logics in a Jewish-Palestinian organization in a mixed city in Israel. The ethnographic inquiry – a long and deep immersion in the field by the first author, involving talk with and observation of organizational members and their interactions – allowed for identifying and analysing the emotional expressions associated with the relevant institutional logics. Not only that different logics were aligned with different emotions, but power relations between subgroups in Israeli society and within the organization affected the legitimacy for certain members and certain sub-groups (Israeli Jews vs Israeli Palestinians) to express certain emotions (like pride, hate, empathy, fear, anxiety, hope, frustration) which in turn affected the constellation of logics within the organization. Power relations and their closely related distribution of emotions mediated, then, the ability of the organization to maintain a desired constellation of logics and shield itself from outside social and political pressures. Similarly, other studies focus on emotions and their interconnections with 'systems of domination' that form institutional dynamics (Voronov & Vince, 2012, p. 58; and see Fan & Zietsma, 2017; Toubiana & Zietsma, 2017; Voronov & Weber, 2016).[4]

This research strategy, examining micro patterns of an institutional problematic, is made possible by the interpretative focus that guides the selection of cases, the collection of field materials, and their analysis. The research design is deductive: not only the choice of case, but also data collection (what data to collect) and analysis (how to move from raw data to interpretative categories) are governed by the conceptualizations of institutions (e.g. logics, work, translation, complexity). Theoretical insights are developed through abduction instead of bottom-up (Timmermans & Tavory, 2012). They are articulated on the basis of an interplay the researchers construct between the empirical case and institutional theory and its rich conceptual language. The heavy hand of institutional theorizing ensures thus that the studied micro-dynamics are indeed microfoundations of institutions.

Exploring the microfoundations at pivotal institutional moments

Collapsing time is another solution to the challenge of collecting real-time data concerning

institutional dynamics – ongoing and 'unfinished' processes (DiMaggio, 1988, p. 12). One strategy is to focus on extreme institutional moments in which institutional dynamics are more evident. Such moments include rapid institutional change, crisis, or the occurrence of institutional complexity in which different institutions come to compete (Greenwood et al., 2011). In such moments, 'conditions make it difficult for people to settle comfortably into routines and where understandings of purpose and legitimate activity are challenged', and so people are pushed 'to articulate and renegotiate implicit understandings' (Haedicke & Hallett, 2016). What happens in these moments and how they reflect on institutional dynamics more generally are interesting theoretical questions that researchers can explore by examining the here and now of these negotiations.

de Rond and Lok (2016), for example, studied the role of institutions in psychological injury at war. They manage to connect the micro experience of psychological injury with the macro context (cultural, organizational and professional) by carrying out 16 months of fieldwork, and especially a condensed and intense six-week 'tour of duty' in a British military field hospital in Afghanistan. In the analysis, they focused on events:

> observations of actual events, or stories of events from current or past deployments—that were associated with direct expressions of distress, or appeared purposely chosen to convey the extremities of war as distressing without necessarily expressing such distress directly. Both authors independently coded the fieldnotes for these events as a basis for discussions on particularly striking examples, and what they might tell us about the lived experience of war across informants. (de Rond & Lok, 2016, p. 1971)

They further scanned the field materials for 'institutionally prescribed practices, rules, norms, and values' that were salient in it, distinguishing between 'three temporal brackets—pre-deployment, deployment, and post-deployment' (p. 1972). By relating these institutionalized practices and the events which triggered them, they

were able to flesh out 'the role of context in the lived experience of war' (p. 1972). Given that 'lived experience in extreme environments can threaten the institutional foundations of everyday life through a breakdown of the sense of the meaningful, the good, and the normal' (p. 1988), focusing on these intense moments may expose institutional dynamics that usually take much more time.

Kellogg's (2009) study of an institutional change also focuses on a moment of change, and adding a comparative design that allows making the most out of it. Kellogg examined two hospitals at a moment of change in formal regulations regarding the work hours of surgical interns and residents. She started her fieldwork three months before the hospitals adopted new practices, and followed them for 12 more months. Comparing the change process in the two hospitals, Kellogg (2009) found that the desired change happened in one hospital but not in the other, and identified the importance of relational spaces, 'areas of isolation, interaction, and inclusion that allow middle-manager reformers and subordinate employees to develop a cross-position collective for change' (Kellogg, 2009, p. 657) in the process of institutional change. Timing her fieldwork to just before the adoption of the new regulation, and the comparative design, allowed for following real-time change, but still within a reasonable time frame. Heaphy (2013) and Lok and de Rond (2013) focus on moments of crisis in institutionalized practices, thus managing to 'collapse' longitudinal institutional processes (in both cases, institutional maintenance) and explore their microfoundations.

Another way to collapse time is to use a cross-sectional design that allows capturing micro-processes at different moments on an institutional path. Hazan and Zilber (2019) ask how institutions take root at the individual level. Most institutional studies assume that individuals internalize institutionalized ideas, yet there are no empirical studies that explore how exactly that happens. Internalization is an individual-level process. Following people as they enter a new institutional space and as they

internalize the institution over time would have enabled the researchers to explore the process, but this would take years. Had they studied it at one point in time, it would have been very hard to connect the micro level to the institutional macro one. Instead, the researchers used a cross-sectional design: they examined how practitioners internalize the ideas of yoga, as an institution, into their identity by interviewing three different groups – beginners, experienced practitioners, and teachers who not only practise yoga for many years but also teach it. Assuming those three groups represent three moments on the path of internalizing yoga as an institution, the researchers compared life stories of the three groups and examined the place of yoga meanings and scripts in each. They found no differences in what practitioners from these three groups know about yoga, but they differed in how each group internalized yoga into their life stories. Using a cross-sectional research design, comparing the micro details of individual identity construction across three moments on the institutional path, new insights are offered about how institutional, macro-level meanings take root on the micro, individual level.

This research strategy – examining significant institutional moments – is made possible by timing the collection of data and a comparative analysis that collapses institutional time frames. Timing the ethnographic study around a planned institutional change or a significant moment of crisis allows the collection of real-time data before, during and after this happening. At times, scholars add another comparison by collecting data in two different organizations, or by using a cross-sectional design. While overall the data has been collected within a short period and did not cover an entire institutional process, this is a very significant time, and thus it exposes institutional micro-dynamics that usually take much longer to evolve. Comparing experiences, understandings and behaviours before, during and after a significant institutional event enable researchers to compensate for the short period of data collection. Theoretically, they shed new light on the microfoundations of institutions as they show how institutions are worked out in unique and significant moments of the institution's trajectory.

Inquiring into the micro-dynamics in an institutional location

Connecting micro and macro levels of analysis in studying the microfoundations of institutions is methodologically possible and theoretically interesting in a location that is, by definition, institutional. An example is an organizational field, which is a distinctively 'institutional' space (Wooten & Hoffman, 2008; Zietsma, Groenewegen, Logue, & Hinings, 2017), where institutional structures, practices, meanings and actors intersect. An organizational field is an enormous entity, which makes it hard or even impossible to capture in its entirety with qualitative tools, let alone ethnographic methods. Still, one may focus on field-level structures or happenings during which and where the field is manifested in full force.

An example is the so-called field-configuring events (Lampel & Meyer, 2008), social events bounded in space and time, serving as the medium through which fields 'come alive' – when central and diverse actors meet, discuss and negotiate the issues that bind them together. Studying field-level events allows for capturing field dynamics *in vivo* (Zilber, 2014, 2015). In recent years, there is a move from the study of 'strong mandate' events and their long-term effects to the study of field-level social events and their inner workings (Gross & Zilber, 2020). Ethnographic studies of these meeting are *ipso facto* studies of the microfoundations of institutions.

Studies of field-level microfoundations of institutions do not need to cover the entire macro process but instead strive to land at crucial institutional locations. For example, Ruebottom and Auster (2018) studied a series of events, We Day, 'rock concerts for social change' organized by Free the Children, a non-profit organization. Focusing on the fine details of the events, they identified two mechanisms

– personal narratives of injustice and action, and individual-collective empowering – that foster reflexivity among their participants. This micro-level study of reflexivity explores microfoundations of institutions, for the researchers follow Furnari (2014) in conceptualizing such events as 'interstitial', meaning 'temporally and spatially bounded social settings that bring together actors from diverse fields around an organized, (partially) structured, and common activity' (p. 471). An interstitial space (Furnari, 2014) or event is, as an organizational field, an institutional space by definition. Thus, whatever goes on within that location may be relevant to institutional dynamics. Indeed, Ruebottom and Auster (2018) connect reflexivity to institutional work (Lawrence & Suddaby, 2006), as it allows people to challenge the taken-for-granted institutional arrangement and potentially promote social change. The researchers did not empirically study the effects of reflexivity on institutional work or the effects of institutional work on institutional arrangements. These possible connections are assumed by grounding them in previous research. Using *in situ* observations Ruebottom and Auster (2018) studied the micro-interactions within seven events, and based on interviews and social media data, they demonstrated how these interactions invited reflexivity among participants. Given the location in which these interactions took place, and what we know based on prior research, Ruebottom and Auster (2018) offer insights that highlight the microfoundations of institutional dynamics.

Similarly, Zilber (2007) studied a field-wide conference of the high-tech industry in Israel. Rather than focusing on the long-term effects of such conferences, Zilber (2007) examined how participants in this event use stories to push their interests in the world of the conference itself. Again, based on other research projects (using different research designs) one may assume political struggles within the event express the field at large and affect it. Yet this is not examined empirically in Zilber's (2007) ethnographic study. Zilber (2011) compared two high-tech conferences, both held in the same year, to uncover how field-level multiplicity is expressed and maintained in field-configuring events. Gross and Zilber (2020) explored the narrative mechanisms that organizers of field-level events use to exert power over participants. In these research projects, the researchers do not attempt to chart longitudinal effects. Instead, they build upon previous studies in offering an interpretation of the events. The theoretical focus is on the microfoundations of field-level events themselves. Since the long-term effects of field-level events were established in previous research, such a focus on the here and now of the events adds the missing link: it opens up the 'black box' by highlighting the mechanisms that form the microfoundations of the long-term institutional effects.

This research strategy – inquiring into the micro-dynamics in institutional locations – is made possible by choosing the right location for the study. Institutional dynamics are ever-present and principally unfold all the time and everywhere. Still, just as crucial moments (crisis, change and multiplicity) carry more potential for an institutional inquiry, so do specific locations. Theoretically, we know that institutional fields come alive through various trans-organizational structures (Anand & Jones, 2008; Anand & Watson, 2004), including field-wide events (conferences, training courses), field-wide organizations (interest societies and professional associations) and field-wide agreements (technological standards, rankings). Thus, researchers can use these particular locations as platforms for the study of the microfoundations of the institutional drama (see Zilber, 2014, 2015). Alternatively, one may identify central spaces in which institutional dynamics unfold and focus on them (e.g. Lawrence & Dover, 2015). Either way, as long as one can justify that the studied space hosts institutional dynamics, one may use ethnographic observations and interviews to explore those dynamics. Although the study may not cover an institutional process in its entirety, it is nevertheless a study of the microfoundations of institutions by virtue of its strategically important location.

Discussion

I set out to explore the interplay between methodology and theory by examining how ethnography is used in studying microfoundations of institutions; in particular, examining how researchers design a research strategy that allows them to explore the fine details of institutional dynamics, while still appreciating them in their broader institutional context. I identified four research strategies, each attending to this challenge differently. These strategies do not reflect technical methodological considerations alone. Rather, each allows for different kinds of theorizing micro–macro connections. My inquiry has implications for both the ethnographic study of microfoundations of institutions and other macro phenomena and for explicating the interplay of methodology and theory. I will attend to each of these two issues below.

Studying microfoundations of institutions by using ethnography

The study of microfoundations of institutions based on a constructivist-process ontology, through ethnography, from the bottom up, has much to benefit institutional theory. It may free institutional theory from a narrow focus on rational and strategic action alone to observe power relations and unintended consequences as well. It may further free institutional theory from looking at 'actors' – making room for flesh-and-blood 'people' (Creed, Hudson, Okhuysen, & Smith-Crowe, 2014; Voronov & Weber, 2020). And it 'will not only provide a fuller account of institutionalization processes but will also enable much clearer parsing of endogenous and exogenous influences' (Powell & Colyvas, 2008, p. 295).

Yet, studying the microfoundations of institutions is challenging. It requires the ability to capture both micro and macro at the same time. In this article, I explored how ethnography is used to that aim. Offering complex, multifaceted interpretative narratives based on thick descriptions from an emic point of view, the

reviewed studies also feed back to the macro level. They situate the micro in the context of the macro and argue not just about the meaning of practice in itself, or emotions, or identity – but rather about institutions.

I identified four research strategies common in recent literature that may help researchers to capture not just micro-level dynamics, but microfoundations of institutions.[5] The four research strategies offer different ways to 'slice' and thus to theorize the institutional drama. Institutionalization is a complex process, unfolding over a long time, and taking place, simultaneously, in different social spheres, across social levels, from the individual through the organization, the field, society and world polity (Scott, 2014). Each of the four research strategies I identified in this paper manages to capture its rich details and, at the same time, offer insights about the institutional dynamics on the macro level, using ethnography. Importantly, the challenge in the study of microfoundations of institutions through ethnography is not unique to institutional dynamics, nor to ethnography alone. Scholars from various fields struggle with it in connection with other macro phenomena and using various qualitative methods (e.g. Nicolini, 2017). Thus, the four research strategies I identified should have broader traction.

Two of the research strategies – zooming-in on micro-dynamics of a documented macro process and focusing on pivotal moments – focus on the temporal dimension of institutionalization. By zooming in on the micro-dynamics of a documented macro process, scholars can attend to its intimate details, yet at the same time situate them within the overall process. By collapsing time through focusing on extreme moments in which the entire macro process is present in nuclei, scholars can explore *how* macro processes work, even if they do not have the data about the whole process. A third research strategy – inquiring into the micro-dynamics in a significant location – slices the macro-level drama by attending to spaces in which the institutional drama takes place. Rather than following the entire process, it

captures it within a meaningful arena, thus offering insights about its microfoundations. Finally, the fourth research strategy – examining micro patterns of macro-level problematics – uses an analytical 'slicing' of the macro-level drama by focusing on theoretical puzzles that are inherently grounded in the macro level yet have manifested and are played out at the micro level. These methodological strategies go hand in hand with different theorizing of microfoundations. For example, whereas the temporally based strategies attend to the process, the spatial and analytical based strategies relate to mechanisms and to the ways that macro-processes are made possible.

I focused on ethnography, which includes direct observations *in vivo* and *in situ*, interviews about the here and now and collection of archival texts (Locke, 2011), since it is well fitted for studying the microfoundations of institutions (Barley, 2019; Haedicke & Hallett, 2016; Hallett, 2010; Hallett & Ventresca, 2006; Jarzabkowski et al., 2013; Kalou & Sadler-Smith, 2015). Yet my emphasis on applying ethnography as part of a research strategy may be at odds with romantic and naive conceptions of the role of theory in qualitative research and especially ethnographic research (see Timmermans & Tavory, 2012; Wilson & Chaddha, 2009). In qualitative research, one is presumably supposed to approach the research site with no prior hypothesis or preconceptions. Popper (1979) called this the 'bucket' approach to scientific knowledge. In the bucket approach, we gather data without preconceived hypotheses and then use induction to move from the empirical observations to interpretation and theoretical insights. Such research is usually phenomenon-driven. Researchers identify an interesting case that poses a general puzzle. Only with time and immersion in the field, the case's significance is articulated (or constructed), and only then can it be theoretically framed. Under such an understanding, one does not theoretically sample one's case study, and researchers are not encouraged to design their research strategically.

Popper (1979) situated the 'bucket' approach against a 'searchlight' approach, in which a hypothesis acts as a searchlight that guides our observations. Indeed, even in qualitative research, we need first to decide where to position the bucket – and for that, we need a searchlight. Which brings us back to the importance of the various research strategies identified in this paper. They can help qualitative scholars to locate a research site and design a research strategy that will better their chances to gather the data that will allow making a theoretical contribution regarding institutions or other macro-level phenomena.

Of course, when using *in vivo* qualitative methods, it is not possible to control how the study will evolve. One needs to know enough to pose the questions that motivate the research. Still, the evolving dynamics in the field of study should direct the researcher as to where to focus attention in both data collection and analysis. Thus, in identifying and detailing these four research strategies, I do not aim to limit the ethnographic or qualitative study of microfoundations into a set of given templates. The ultimate test of any microfoundations approach is in its ability to allow the capturing of both micro and macro. Such a challenge necessitates creativity, flexibility and rigour. We need to dedicate more efforts to explicate the methodological choices – regarding research strategy, case study, data collection and data analysis – that are made before the study begins, and during its early phases, and their theoretical implications. My intention is not to establish orthodox guidelines for the use of ethnography in the study of microfoundations. Instead, I hope that the explication of the prevalent research strategies in current studies of the microfoundations of institutions will help scholars and our field as a whole to reflect on balancing the focus on micro-level interactions with their macro-level context.

The interrelations between method and theory

While it is well accepted within the discipline of organization studies that theory and methodology are interrelated (Cornelissen, 2017; Delbridge & Fiss, 2013; Van Maanen et al.,

2007), there are very few inquiries into this interplay within specific theoretical domains and regarding particular methods. Schneiberg's and Clemens' (2006) exploration of the 'typical tools for the job' used in institutional studies is well cited, yet most of the over 230 citations are empirical studies that use Schneiberg and Clemens (2006) to justify the selection of a research strategy. Some are theoretical reviews or arguments for new theoretical avenues that at times dedicate short passages to methodological issues (e.g., Bitektine & Haack, 2015; Cornelissen et al., 2015; Gray, Purdy, & Ansari, 2015; Greenwood et al., 2011; Haveman & Wetts, 2019; Lander & Heugens, 2017; Modell, 2015; Modell, Vinnari, & Lukka, 2017; Sillince & Barker, 2012; Zilber, 2012). Very few follow suit in discussing more broadly how methodological choices impact and intertwine with theorizing (see Bechky, 2011; Cornelissen, 2017; Fine & Hallett, 2014; Hudson et al., 2015). Nicolini's (2009, 2017) expeditions into the methodological aspects of studying and theorizing practice were similarly very well cited but mainly used to justify specific methods used in an empirical study. It is perhaps not surprising that these previous systematic explorations of the link between theory and methodology in theories of organizing were not followed, as we tend to be quite anecdotal in exploring knowledge production in our field (Zilber, Amis, & Mair, 2019). Yet it is regretful, as we miss a valuable opportunity to appreciate fully – reflect upon and maybe act upon – how our methodological preferences, many of them taken for granted after the training period early in our careers, create affordance for theorizing.

The four research strategies to study microfoundations identified in this paper highlight first how methodological choices that necessarily and inevitably limit the scope of any single study also limit the theorization it can offer. Second, these limitations affect not only a single study – but also the overall theoretical conversation that constitutes the disciplinary field.

Only one of the four strategies allows us to 'really' – that is, empirically – capture both macro

and micro. Zooming-in and zooming-out will enable the collection and analysis of fine details and the full process. The other three strategies situate the micro within the macro by collapsing the ever-going macro process into specific moments, or the all-encompassing macro-dynamics into particular locations, or the varied simultaneous dynamics by focusing on specific aspect thereof. These compromises are necessary – no single study can capture everything. Yet they come at a cost. The need to recognize pivotal institutional moments to be able to collect field materials within a reasonable duration of time may contribute to the tendency to study dramatic institutional processes, and neglect more mundane institutional work in the everyday (Barley, 2019; Powell & Colyvas, 2008; Powell & Rerup, 2017; Smets et al., 2017). Further, approaching a research site with a given set of conceptual tools that presumably ensure that the study explores an institutional problematic may limit our sociological imagination and the expansion and questioning of our conceptual toolkit. For example, scholars may aspire to identify (yet) more types of institutional work (a critique voiced by Lawrence, Leca, & Zilber, 2013) instead of allowing the empirical case to inspire more revolutionary takes on the very concept.

The interplay between methodology and theory not only affects every single study, but also takes part in compartmentalizing the theoretical conversation as a whole. Methodological choices that necessarily and inevitably limit the scope of data collection and possible theorizations may be part of the forces responsible for the fragmentation of the knowledge produced in our field (the so-called paradigm wars and the discussions around the incommensurability problem back in the 1980s and 1990s are examples). Indeed, institutional theory is a 'big tent' (Greenwood et al., 2008; Greenwood et al., 2017), yet at the same time, it seems to be dismantling into (too) many fragmented sub-conversations that break down the field as a whole. Add to that political and identity dynamics between various sub-conversations (institutional logics and institutional work are one example; see Zilber, 2013). All

these limit our ability to integrate knowledge across methodological and theoretical boundaries. New thinking about mixing methods, integrating conceptualizations and using meta-analysis to aggregate knowledge (especially challenging in the area of qualitative studies, Josselson, 2006) are needed to offer new solutions to these inherent challenges involved in the interplay between theory and methodology.

My dive into the practicalities of the interplay between methodology and theory highlights the complexity of this effort, which can only be resolved on the ground, as the study unfolds. What is essential, then, is the ongoing reflection of researchers (Alvesson & Sköldberg, 2000), by which they may explicate and consider their methodological choices and their theoretical affordances. I hope that my inquiry into the methodological choices made by previous researchers, and the theoretical affordances of these choices, will contribute to that necessary and challenging endeavour.

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Notes

1. The study of microfoundations is similar, but not identical, to micro-level studies on the one hand and to multilevel studies on the other. While a micro-level focus is the cornerstone of many organizational behavior and psychological studies, the defining characteristic of the microfoundations wave is its focus not only on individuals, but also on interactions between individuals, in their macro-level context (organizations, fields, society). Microfoundations studies may be conceptualized as a sub-category of multilevel designs (e.g. Aguinis & Edwards, 2014; Klein & Kozlowski, 2000). Yet, studies of microfoundations are not only about showing how macro-level processes are spelled out at the micro level, but also attempt to explore the 'process within' macro-level phenomena, and thus rethink the micro–macro divide, as well as mutual micro–macro effects (Barney & Felin, 2013).

2. Most but not all the studies I review here use the label 'ethnography'. Some opt for other labels such as 'embedded case study' or 'inductive case study'. I included those studies that use real-time field materials – ethnographic observations and ethnographic interviews that focus on the here and now. I thus avoided research based solely on retrospective interviews or archival data.

3. Borrowing Nicolini's (2009) terminology.

4. Studies of emotions are part of the recent renewed interest in daily activities, which remind us again that most of the institutional drama is mundane, carried out by 'regular' people (Powell & Colyvas, 2008; Powell & Rerup, 2017; Smets et al., 2017). Since daily activities are so taken for granted – and thus hard to capture analytically and within a research project – the recent interest in multimodality may be of help (cf. Höellerer, Daudigeos, & Jancsary, 2017; Zilber, 2018). Taking into account not only the cognitive and the political, but also the emotional (as exemplified above), the material (e.g. Monteiro & Nicolini, 2015; Svejenova, Mazza, & Planellas, 2007), visual (Drori, Delmestri, & Oberg, 2016; Höellerer, Jancsary, Meyer, & Vettori, 2013), spatial

(place and space, e.g. Furnari, 2014; Kellogg, 2009; Lawrence & Dover, 2015;) and the body (Stowell & Warren, 2018) may offer new avenues for micro-level studies to explore the microfoundations of institutions.

5. While the distinction between these four research strategies is analytically beneficial, they are not mutually exclusive. Some studies utilize more than one research design. For example, Fan and Zietsma (2017) zoom-in on the microfoundations of a documented institutional process while also focusing on the micro-patterns of a distinctive institutional problematic. Hardy and Maguire (2010) zoom-in on micro-dynamics of a documented macro process within a distinctive institutional space (field).

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