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Interview

The Return of Meaning and Values: A Conversation with Roy Suddaby on Institutional Theory, History, and Change

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ABSTRACT

This interview presents Professor Roy Suddaby's reflections on history, values, and the future of institutional theory. He discusses the evolution of institutional work, the use of historical analysis, and the renewed attention to meaning and values in the study of institutions. The conversation addresses the challenges of theoretical dominance, the emergence of new ideas, and the role of collective memory in understanding institutional continuity and change.

Professor, before becoming one of the leading voices in institutional theory, you worked outside academia. Your early papers examined institutional change in the professional service firms now known as the 'Big Four' — then the 'Big Five'. Could you tell us what experiences shaped your intellectual trajectory? (Patricia Ayumi Hodge Viana de Carvalho and Renata Andreoni Barboza)

Roy Suddaby: Well, the danger is that this is going to be a very long answer, but it's an important question for me. I entered academia quite late. I started my career as a corporate and commercial lawyer and worked in that field for about 10 years. One day, my daughter, who was very young at the time, was asked by one of her friends: "What does your dad do?" Her answer was: "He talks on the phone all day." I thought, "Oh, what a terrible thing that is." I then discussed it with my wife and said, "I'm going to go back and do a PhD." And so I did.

At first, I thought academia was all about teaching. The idea of doing research was completely shocking to me. Fortunately, I liked it very much. I was lucky enough to go to the University of Alberta, where people were interested in institutional theory. At the time, institutional theory focused largely on how organizations and institutions stayed the same. In my context, this was not true. Accounting firms acquired law firms, and accounting firms diversified. The 'Big Five' have expanded into many areas. For example, KPMG acquired a bank. Therefore, the idea that institutions did not change seemed strange to me. I said, "I'm going to do a dissertation on multidisciplinary partnerships and how institutions change." People told me, "Well, you'll never get a job." And I said, "That's OK, I can always go back to being a lawyer."

Then — and this is pure luck— I put my head down for two years and wrote my thesis. When I surfaced from that, there was a special issue of the *Academy of Management Journal* on institutional change. Therefore, papers started to be published.

The next phase was when we realized that we had been biased toward rapid, revolutionary institutional change. The collapse of Arthur Andersen was a calamity. Nobody thought that this organization would go down. And it occurred to me that most institutional change is invisible because it occurs slowly and incrementally. Instead, we had focused on the most disruptive forms of institutional change and created the false impression that all change happens that way.

We then began talking about institutional work, the invisible activity that takes place behind the scenes and constitutes the mechanism through which most institutions operate. This eventually led me to question the history. Canada is a very contingent country, because it could theoretically break apart at any moment. We have the Quebec issue to consider. We are constantly asking whether we are a 'real country.' In a sense, that is a good thing, because it allows us to see more clearly the processes through which history is carefully constructed to sustain the nation-state. In Canada, history is constantly being rewritten, particularly now in relation to our First Nations and Indigenous peoples.

This is a long answer to your question. The short answer is that I tend to be critical of taken-for-granted assumptions in the literature and try to see things from a different point of view. I think that is valuable because it leads to the kind of critical stance that is often missing in much of our scholarship today.

And where do you think that critical stance comes from? (Patricia Ayumi Hodge Viana de Carvalho and Renata Andreoni Barboza)

Roy Suddaby: I think part of the advantage came from the PhD program at the University of Alberta. If you followed the macro-organization theory track, which I did, we were required to take courses in sociology. In the sociology department, there was a very strong critical tradition, and we studied many of the major critical theorists. I think this critical perspective ought to be embedded in our PhD programs, and I do have the sense that Brazil does a very good job of this.

I would say this is one of the things that attracted me to institutional theory, because one of its core premises is that organizations often do not act solely for technical reasons. They act for social reasons first, and only later add a thin layer of rationality on top. You can see this in what is happening today with the American war, where there seems to be great difficulty in justifying why it is happening and why now.

When you adopted a historical perspective, you were not moving away from institutional theory, which had become dominant in organization studies, right? (Patricia Ayumi Hodge Viana de Carvalho and Renata Andreoni Barboza)

Roy Suddaby: I do not think that I have moved away from institutional theory. Rather, I think institutional theory itself has become very rationalized and essentialized over time. It has moved away from its critical perspective and

social-symbolic roots. As a result, we now have many explanations that carry only a thin veneer of rationality and explain very little. We talk about institutional logics, we talk about institutional complexity, and in many ways, this becomes just another version of contingency theory. It gives us a set of variables to look at, but it does not provide a real explanation.

What really matters is getting down to the micro-level granularity of the change. Historians tend to do this well. They understand that there is never a single cause. Instead, multiple elements come together to produce particular outcomes, and only afterward do we construct a rational explanation. We do this because we already know how the story ends. But that does not give us much predictive capacity. That is one of the reasons I like history. History does not pretend to be predictable. It tries to explain causality, but it also recognizes that causality is always complex and contingent.

So, going back to institutional theory, once a theory becomes hegemonic, it becomes an institution itself and therefore becomes difficult to change. One important difference between what we study and what people in the hard sciences study is that rocks and other natural objects do not change simply because geologists give them names. But when we name social phenomena, we tend to solidify them and freeze them in time. The challenge we face is that the world keeps moving, while theorists often seek a theory of everything that will last forever, and institutional theory has, to some extent, become that. But it cannot be. It must be continually updated to respond to changing circumstances.

What I have been looking at more recently is not so much the macro-level structure of institutional theory, but rather its component parts. My students, for example, are working on topics such as social evaluations, legitimacy, authenticity, reputation, status, and identity. These are the elements that make up institutions, and we know they are fundamental to how institutions operate. Because of that, we need to study them more directly. I see social evaluations as the foundation of much of institutional theory, although they have not always been treated that way. Legitimacy, of course, has always received attention, but when you look closely at the literature, the discussion often fragments into regulative, normative, and cognitive legitimacy, and so on. This is useful, but legitimacy cannot be understood in isolation. For example, you cannot discuss legitimacy without also discussing authenticity. They are not opposites, but they tend to co-occur. There is a wonderful paper by Westphal and Zajac (2013) showing that you cannot talk about reputation without also talking about status. Reputation is earned through day-to-day performance, whereas status reflects the accumulated history of that performance. As a result, reputation can decline quickly if performance declines. However, status tends to persist much longer, even after performance drops. We need to understand these dynamics of social evaluations because they are part of what constitutes institutions.

So, in your view, is the historical turn in management consistent with the main ideas of institutional theory? (Patricia Ayumi Hodge Viana de Carvalho and Renata Andreoni Barboza)

Roy Suddaby: The study of history in organizations is really an extension of institutional work. Institutional work examines the incremental changes that maintain or disrupt institutions, and for me, the only way we can really access those processes is through historical studies.

If you go back to old institutionalism, most of the classic studies were historical case studies. In fact, some of the best institutional theory, in my view, comes from books rather than journal articles. Westney (1987) wrote a wonderful book about the adoption of new practices in Japan after the Meiji Restoration. Historically, Japan had been relatively isolated from the rest of the world for many centuries. Eventually, the United States forced Japan into trade relations—this is where the expression 'gunboat diplomacy' comes from. After that, the Japanese government made a deliberate and rational decision: it concluded that the world had changed and that it needed to adopt new institutions. What is fascinating is that they did not simply copy those institutions; they adapted and often improved them. They adopted the postal system from the United Kingdom, aspects of the educational system from Germany, and many other institutional models, but they implemented them in very thoughtful ways. If you look at Japan today, you can see how successful that process was. For example, the train system works far better in Japan than in England or much of Europe. To me, that kind of historical process is exactly what institutional theory should be studying.

And collective memory has also become an important theme in your recent research, especially in your work with Indigenous communities. How did this line of inquiry develop? (Patricia Ayumi Hodge Viana de Carvalho and Renata Andreoni Barboza)

Roy Suddaby: In the work I am doing with Indigenous communities, the idea of collective memory is very much alive. We have been working with several First Nations around the Great Lakes, where colonization first took place.

One of these groups was the Huron tribe. Of all the major First Nations in that region, they were among those most affected. They lost wars, primarily with the Mohawks; their population was reduced, and they were eventually forced to relocate. This kind of relocation happened quite often in Canada, where Indigenous groups were moved from their traditional lands to places far away.

When they were relocated, one of the first things they did was dig up the remains of their ancestors and take them with them because they could not imagine having a home without their ancestors. One explanation they provide is that they talk to their ancestors every day. From an outsider's perspective, this may sound like magical realism, where the dead remain present in everyday life. But for me, that is collective memory in an animated form.

I also examine how fear of the government can be transmitted across generations. How exactly that happens, we are still trying to understand. We have a large research team working on this, including several Indigenous scholars, and they argue that the mechanism is storytelling. It is narrative. So we are working with narrative both as a form of therapy for trauma and as a research method for uncovering stories about trauma. If we ask direct questions, we probably would not get very far in our understanding. But if we invite people to tell stories about their experiences and create space for long, detailed narratives, we begin to see what is really going on.

I think there is a strong connection between narrative and collective memory that we still do not fully understand. Over time, these narratives may become institutionalized and turn into what we call myths. But for the people telling them, they are not myths at all — they are simply stories.

Your research has shifted from the macro-level structure of institutions to their micro-level elements, correct? (Patricia Ayumi Hodge Viana de Carvalho and Renata Andreoni Barboza)

Roy Suddaby: Yes, and if you are familiar with the history of institutional theory, this is really a return to what we used to call the old institutionalism. This is Selznick (1949), who spoke about the infusion of meaning and values. He studied public organizations through longitudinal historical analyses. In a way, I am returning to that version of institutional theory.

I think what often gets lost in all of this is the conversation about values. There is a very inspiring paper titled 'The Value of Values' (Kraatz et al., 2020) that highlights the idea that values are a primary mechanism through which institutions operate. I have also been reading the anthropologist Appadurai (1986), who writes extensively about slavery as the commodification of humanity. He uses a wonderful expression — value regimes — to describe the idea that we need to understand how the prioritization of certain values over others changes across societies and time.

Given these changes, how do younger scholars navigate this ever-changing nature of theories? Should they anchor their work in mature theories, or engage with emerging ones? (Patricia Ayumi Hodge Viana de Carvalho and Renata Andreoni Barboza)

Roy Suddaby: That is a really good question. There are two components to this. One concerns the substantive theory itself, but the other concerns how to deal with situations in which you have ideas that differ from the established argument. This is particularly relevant in institutional theory, where it has become so dominant that introducing new ideas can be very difficult. There are many gatekeepers in this field.

The trick is that it is a little like writing a successful pop song. It must sound new, but it also has to sound familiar. I usually advise my students to avoid using the word institution in their papers at all, but instead to work with some of the sub-concepts of institutional theory. For example, you can use ideas such as mimesis, legitimacy, or authenticity, but avoid using the word institution itself. That gives you a certain degree of freedom, because it allows you to engage with the institutional theory conversation without being constrained by it. We avoid the big bully on the block by creating a new language that allows us to access those ideas and publish in the journals they control without having to adopt all of the baggage that comes with them.

That is interesting, and it also makes me think about how new research interests take shape. In your recent work, for example, you have developed an interest in craft. Could you tell us how this came about? (Patricia Ayumi Hodge Viana de Carvalho and Renata Andreoni Barboza)

Roy Suddaby: Well, there are a couple of reasons why I became interested in craft. One is that my students often introduce me to new empirical contexts. I currently have two students, both from India, who are interested in this idea of craft. One of them, in particular, used to run a consortium of handweavers in India who produced cloth, and he came with a very practical question: how can you scale this kind of activity without losing the essence of what it means to be craft? I became immediately interested because this creates tension between legitimacy and authen-

ticity. If you want to be a legitimate business, you need to grow and operate at scale. But if you become too large, you risk losing authenticity. This is what I call an authenticity trap. I am also interested in craft because it connects to institutional theory in an unusual way. Institutional theory has always attempted to integrate economic and social explanations. Historically, there have been many moments when these two ways of thinking have coexisted. For example, consider the history of alchemy. There was a time when the world was dominated by a hegemonic religious worldview, but gradually it shifted toward science. In that interstitial period, many of the people we now consider great scientists were also alchemists. Isaac Newton was an alchemist, and so was Robert Boyle, but we tend to erase that part of history and present a much cleaner narrative than what actually happened.

Craft is interesting for similar reasons. Like many of the things we study, it is a moving target that is constantly changing. If you go back far enough, what we now call craft was simply work, because everyone worked that way. Then, with the Industrial Revolution, a new distinction emerged, and the older forms of work became romanticized and labeled as craft, in opposition to industrial production. Today, we are even further removed, and craft has become almost a narrative or a discourse, sometimes detached from the actual work itself, but still carrying a strong sense of idealism. It connects to my general point in this interview that the world keeps changing, while the categories we use to understand it emerge over time and are constantly being redefined. The same is true for institutions as well. What we consider an institution will always change, and that is actually good for us as scholars, because, unlike geologists, whose objects of study remain relatively stable, our world keeps moving.

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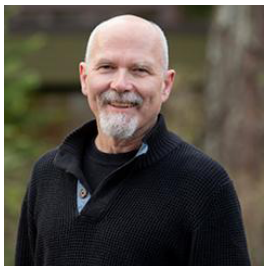

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