

# Understanding change in higher education: an archetypal approach

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**Abstract** During the past three decades, higher education institutions have been changing, moving away from the traditional bureaucratic archetype towards a more managerialist one. Empirical research already demonstrated that organisations tend to be in a hybrid area of archetypal change. Considering the specific case of a government-imposed reform in Portugal, and using a case study approach of six public universities, this study aims to explore archetypal hybridism through the lens of two main dimensions: systems and structures and interpretive scheme. The theoretical background lies on academic literature on organisational change in higher education and specifically on archetype theory. The findings drawn from document analysis and interviews outline the main characteristics of the hybrid archetype that we chose to name efficient-collegiality.

**Keywords** Archetype · Governance · Higher education · New institutionalism · New public management · Organisational change

## Introduction

Over the last four decades,<sup>1</sup> the public sector and specifically the public higher education (HE) sector have been subject to pressures that resulted in substantial change. The Humboldtian university as we knew it, where knowledge seeking and sharing was a value on its own, has been questioned first by massification processes and then by New Public Management (NPM)

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<sup>1</sup>This timeframe applies mainly to the Anglo-Saxon world (the United Kingdom, Australia and New Zealand), where these pressures first began to be felt.

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influence. Based on the assumption that public sector organisations were over-bureaucratised and inefficient, the NPM ‘menu’ argued for the primacy and advantages of private sector management practices and for the benefits of their use in public sector organisations.

Within these NPM-based assumptions, universities have to operate in a more (market-like) competitive environment and, at governance level, attempts have been made to change traditional university consensus-based structures into centralised strong leadership power boards. In this new scenario, not all academics have a seat, and consequently have less opportunity to voice their opinions. Moreover, the shared governance model was extended to include external members, thus changing the traditional collegial model of running a university to a business-like model, with decisions being taken in a more top-down basis (Carvalho and Santiago 2010a, b; Deem et al. 2007; Huisman 2016; Enders 2016).

There is a clear change of paradigm, already identified in the literature on organisational change in HE, with public HEIs moving away from what was their traditional model into a model clearly closer to private sector practices. Empirical research has already identified the resulting hybridism of this change of archetype (Berg and Pinheiro 2016; DeBoer et al. 2007; Deem 1998), but from our point of view, existing research falls short in defining and understanding it. What characterises that hybrid archetype? Which characteristics from the traditional professional bureaucratic archetype remain untouched and which characteristics from a more managerial-like archetype managed to introduce themselves in public HEIs? How can we characterise and understand this hybrid archetype?

In order to analyse these issues, we argue that using the notion of archetype, resorting to the original work of Greenwood and Hinings (1993) to characterise the dominant organisational model, as an ideal type, can constitute a useful framework to help explore the hybridism resulting from the changes implemented in HE. Our reflection is based on a case study of a reform imposed on HEIs by the Portuguese government in 2007.

## The changing university: the Portuguese context

Universities are among the oldest organisations in the world. Although knowledge seeking and transmitting remains their most important characteristic, much has changed.

Portugal is a case worth highlighting since its HE system had a later development compared to other European systems. The main reason is based on the fact that only in 1974 did the country establish a democratic regime, after a long dictatorship. In a short period, Portugal moved from an elite to a mass HE system (Neave and Amaral 2012), thus getting more attention from the state and society at large. An important point worth noticing is that the 1974 revolution enabled a new Constitution to be drawn up where ‘new’ principles were guaranteed, such as autonomy and democracy. In this context, HE was seen as a guarantee for society democratisation and the right of access to higher education was assured (Neave and Amaral 2012). The new democratic social environment was mirrored in HE legislation (Law 108/88, of 24 September) by the establishment of large collegial governance boards and an academic life with a high level of participation. However, this new governance model coexisted with a traditional and very hierarchical one, similar to a chair holder system that perpetuated relations of dependence allowing those at the top to maintain a dominant position (Carvalho 2012). Nevertheless, the participated and collegial model soon becomes institutionalised in academia actors’ discourses (Carvalho and Santiago, 2010b).

From the establishment of a democratic regime until the emergence of the first managerial reforms, the analysis of Portuguese HE system can be divided as Magalhães and Santiago

(2012) suggest, in three phases: the Days of Revolution (1974–1976), the Period of Normalisation (1976–1986), the Decade of Massification (1986–1996) and the Rise of Managerialism (1996 to present). Reforms reflecting NPM and managerialism ideology, although already present in the political discourse, first arrived in Portugal in the early 2000s. From the series of new legislation published throughout that decade, Law 62/2007, known by its acronym RJIES, is the one to impose the greatest changes to the HE system, allowing institutions to choose to become foundations (public institutions regulated by private law). From the 14 public universities in Portugal, three chose to become foundations mainly due to financial reasons: foundation universities would get more autonomy in getting and managing their funds, and human resources, not having to abide by the general public administration rules. Besides the new institutional model introduced by the RJIES, the new law also established important changes at governance structure level, which are at the core of our research: fewer governance boards, composed of a smaller number of members (showing a great decrease when compared to the model that had prevailed until then), introduction of mandatory presence of external members, empowerment of important decision-making instances, among the most relevant ones. The extent to which these changes promoted the emergence of a new organisational archetype is further discussed.

### **Analysing change in institutions: a theoretical approach**

Organisational change has been a core research area over the last two decades (Micelotta et al. 2017) to a great extent because of reforms in the public sector. The great variety of studies aim to understand several aspects that relate to this matter: what leads to organisational change; how is the organisational change process in itself; what results from the change process; and how do organisational actors behave in the face of change (Fumasoli and Stensaker 2013; Gornitzka et al. 2005; Gornitzka and Maassen 2000; Huisman 2016; Enders 2016). Institutionalism and its various sub-fields have been widely used as the theoretical framework that best helps explain an organisational change process.

Institutional theory emerged as an alternative to the rational perspective on organisations by focusing on the more resilient aspects of social structure. According to this theoretical framework, institutions include governance structures but also social arrangements, norms and rules and ways of thinking (Scott 2004; Meyer and Rowan 1977). Symbolic and behavioural systems containing representational, constitutional and normative rules, together with regulatory mechanisms, define a common meaning system and give rise to distinctive actors and action routines. Institutions differ from organisations in the sense that they are constituted by three main pillars: regulative, normative and cognitive (Scott 2004).

The maturation of institutional theories demonstrated both the multifaceted character of institutions as well as the way processes of change occurred. The first studies on institutional change started from a top-down perspective meaning that they started from changes in institutional environment trying to understand how exogenous events affected organisational fields and organisations within it. According to Micelotta et al. (2017), three distinct approaches can be identified as trying to clarify how macro-environmental changes result in processes of deinstitutionalisation and transformations in legitimacy-conferring criteria. First, studies inspired by an institutional and population ecology approach conclude that organisations are not capable of adapting in due time to external environment changes leading to the disappearance of organisational forms and practices with the emergence of new ones to replace

them. In the opposite direction, a second group of studies assumes that organisations are capable of change and tries to understand the factors affecting their responses to transformations in institutional environment and the organisational strategies and characteristics, which facilitate or hide successful processes of adaptation (Allmendinger and Hackman 1996; Kriauciunas and Kale 2006). A third line of studies relies on the field-level and on the notion of institutional logics (Thornton and Ocasio 2008). This is one of the most popular and promising approaches to institutional changes since it assumes change as a complex and multifaceted process and allows a better understanding of the way values, beliefs and cultural norms are historically contingent. Studies within this field provide explanation for such distinct factors as composition of governance structures (Reay and Hinings 2005), changes in professionals (Lounsbury 2002), in actors' relation with meanings and identities and in the dominant organisational archetype (Kitchener 2002).

In line with other studies that try to analyse processes of change in governance structures and in professionals (Amaral and Magalhães 2007; Carvalho and Santiago 2010b) in Portuguese HEIs, it is our conviction that we could improve the knowledge on institutional changes in Portuguese HEIs by developing an approach based on organisational archetype.

The study of organisational change using an approach based on archetypes received a major drive with Greenwood and Hinings' (1988, 1993) work, where they explore and develop the concept of archetype and discuss its implications for the study of organisational change. Archetype theory has been particularly used in the study of organisational change specifically focused on professional service organisations, such as accounting firms, law firms and health care/medical practices (Brock 2006; Brock et al. 1999; Dent et al. 2004; Pinnington and Morris 2002). Organisations such as these are recognised as sharing one main common characteristic: that of having professionals that are not only operators, but also managers of the organisation they work in (Brock 2006).

### The archetypal approach

Greenwood and Hinings (1993) base their definition of 'archetype' on a holistic perspective that understands organisational structures through general patterns and not so much by 'narrowly drawn sets of organizational properties' (1993, p. 1052). According to the authors, patterns correspond to the elements that constitute what they name 'interpretive schemes' (set of ideas, values and beliefs), which underlie and are present in organisational structures and systems. As such, the authors define the concept of archetype as 'a set of structures and systems that reflects a single interpretive scheme' (Greenwood and Hinings 1993, p. 1052).

Considering that archetypes are important to understand organisational change, Greenwood and Hinings define change as the movement between archetypes (1993, p. 1053). Moreover, archetypal change requires modification of the underlying interpretive scheme, which is what defines an archetype. The approach to organisational change focusing on the idea of archetypes is an attempt to explain organisational diversity resulting from the change process. The authors draw on neo-institutional theory to develop a theoretical framework that considers the influence of both environmental pressures and intra-organisational dynamics in an organisational change process (Greenwood and Hinings 1996).

The concept of archetype is based on the need to understand organisational change and specifically organisational diversity through typologies (Greenwood and Hinings 1993). Applied to organisational studies, archetypal theory entails a classification of organisations

according to identified types that each present a common and coherent set of organisational arrangements (Greenwood and Hinings 1993).

The notion of archetype further entails two concepts: that of structures and systems and that of interpretive scheme. The analysis of organisational change through the archetype theory perspective involves considering both changes occurring at structures and systems level, and at interpretive scheme level, as they not only interact with each other, but also influence each other into adapting to change. As Brock (2006, p. 160) puts it, ‘structure, systems and their underlying interpretive schemes stand in a reflexive relationship with each other’.

Organisational structures and systems define the way an organisation operates, identifying roles and allocating tasks, responsibilities and also authority, by defining hierarchy (Greenberg 2011; Lunenburg 2012). There are different types of organisational structures as each organisation operates in its own way, and structures and systems are designed to enable organisations to meet their own goals (Lunenburg 2012).

The idea of interpretive schemes adds a subjective meaning to (objective) organisational structures and systems (Brock 2006). Interpretive schemes relate to the set of ideas, values and beliefs organisational actors hold about their own organisational structures and systems and therefore are considered to underpin them (Greenwood and Hinings 1993). They can thus be considered as ‘mental elaborations’ from organisational actors on the concrete reality of their own organisation (Silva and Fonseca 1996, p. 143).

Considering that the archetype consists of the relationship between structures and systems on one side and an interpretive scheme on the other, and that values and ideas are not easily or equally changed among organisational actors, Greenwood and Hinings refer to a period when there is not a single archetype; instead, different archetypes co-exist—the authors write about archetype incoherence (1993, p. 1075).

Different archetypes may indeed co-exist at the same time—we may rather speak of a ‘confluence’ of archetypes—and each one of them has its own characteristics. The co-existence of different archetypes may reflect the co-existence of different institutional logics (Thornton and Ocasio 2008). This concept brings with it the idea of multiplicity of logics, as it considers that they may co-exist in most fields. Among these multiple logics, some may be dominant and lead to shift from one institutional logic to the other (that might not be eliminated and simply co-exist), producing change.

In the public sector in general, and particularly in higher education, the dominant institutional archetype is traditionally framed by professional bureaucracy (Mintzberg 1992), which relies on the work of highly specialised professionals who have undergone training at HE level. The authority given by the power of expertise favoured the great amount of autonomy these professionals have. Regarding structure, professional bureaucracies are highly decentralised, and with regard to decision-making, they are based on collegial values and these values are apparent in highly participated and represented decision-making structures (Brock et al. 1999; Mintzberg 1992). However, due to the influence of NPM and managerialism, this archetype is now thought to have been substituted by a managerial one. The managerial archetype is based on more hierarchical structures that reveal evidence of a total or unitary organisation (Carvalho and Santiago, 2010a; Enders et al. 2008). Adding to a more top-down structure, there is a shift in professional power with the cultural-cognitive framework being highly influenced by managerial values and norms.

The idea of archetype ‘confluence’ is where the ‘hybrid archetype’ is to be found, as shown in Fig. 1. The intersection area between two archetypes is where this archetype ‘confluence’ occurs, as elements from both the starting archetype (professional bureaucracy) and the more

recent archetype (managerialist archetype) are present and overlapping to a certain degree—the hybrid organisational form.<sup>2</sup> The arrow shows that movement between two changing archetypes can be bi-directional. It is this hybrid area where more than a single archetype can co-exist that is of interest to this study and will therefore now be explored.

This calls for a brief overview of the concept of hybrids. According to Pache and Santos (2013), hybrid organisations ‘incorporate elements from different institutional logics’, they ‘are by nature arenas of contradiction’ and they ‘can take different forms’ (p. 972). Hybrids result, therefore, from a blend of multiple institutional logics (that account for a complex environment) they are exposed to and incorporate.

## Organisational change in higher education

In higher education studies, top-down perspectives are also dominant in the analysis of institutional change. Several studies in the area of public administration and HE have identified a change considered to be caused by the emergence of NPM and managerialism ideas and consequent political pressures put on public sector institutions in general, and particularly on HEIs (Amaral 2009; Bardouille 2000; Brock 2006; Carvalho and Santiago 2016; Lazeretti and Tavoletti 2006; Locke et al. 2011; Magalhães and Amaral 2007; Santiago et al. 2005).

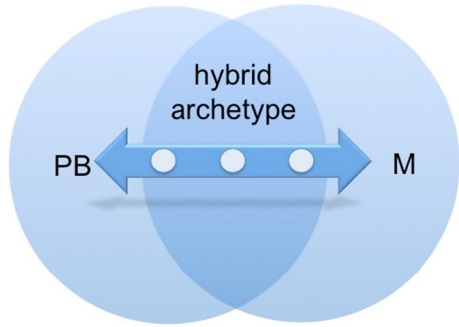
The same three approaches identified by Micelotta et al. (2017) can be used to group studies on changes in HEIs. Gornitzka and Maassen (2000), for example, approach organisational change in HE combining institutional theories with the resource dependence perspective concluding that universities differ in their response to environmental changes and those different responses are due to the signals they get from the state and other actors, and to their own internal situation (Gornitzka and Maassen 2007).

Few studies can be identified that represent successful responses to changes imposed from external environment. On the contrary, confirming institutions’ resistance to change according to environmental impositions, Boitier and Rivière (2013) found resistance to the institutionalisation of a new organisational model in the French HE system.

Finally, assuming an institutional logic perspective, different authors try to understand if and how institutional logics have been substituting each other. Taking a historical perspective, Reihlen and Wenzlaff (2016) tried to identify the different dominant institutional logics in the post-war period in Germany. Based on a unique interplay of logics, actors and governance systems, these authors identified three different eras: the professional dominance (1945–1968) that was replaced by an era of federal involvement and democratisation (1968–1998) until 1998 when managerialism and marketization became guiding principles for the emergence of a new archetype defined as managed education. The entrepreneurial university is identified as the new organisational model that emerged as a response to the managerial institutional pressures. In contrast, using the archetype theory, Enders et al. (2008) concluded that there is no evidence, in the case of Netherlands, of organisational transformation since there is no

<sup>2</sup> It is not within the scope of this study to theorise on hybrids or hybridisation processes. We choose to write about ‘hybrid archetypes’ assuming that any form of hybridism is the result of a blur in boundaries and, within organisational studies ‘[hybrids] describe organizations that span institutional boundaries’ (Doherty et al. 2014). As such, we assume ‘hybrids’ as an organisational archetype, having the same characteristics as archetypes—structures and systems, and interpretive scheme. Hybrids can either be a transition between archetypes or become permanent archetypes themselves. Organisational change is permanently occurring, which makes it difficult to speak of permanent archetypes. However, some of them do prevail for long periods and those could be considered as ‘reference archetypes’.

**Fig. 1** Archetypal change: the hybrid area



swing of archetype of the university. They sustain that universities are closer to a professional public organisation model but academic self-regulation persists as an important element of organising in HE. In the same line, Krücken et al. (2013) identify important changes indicating a managerial turn in higher education in Germany, but sustain that the core characteristics of a professional organisation (with basic processes remaining under the control of academics) have been retained. Bleiklie et al. (2011) also conclude on the inexistence of radical transformations in the four countries analysed (Netherlands, France, Norway and Switzerland) but assume that the assumed changes in governance patterns had impact on academic work and even on the traditional position of the academic profession (Bleiklie et al. 2011).

In Portugal, empirical research on shifts in institutional logics related with NPM target both the governance structures (Magalhães and Amaral 2007) and the professionals (Carvalho and Santiago 2010b). In both cases, studies conclude for the existence of hybridism meaning that there is a co-existence of elements of a more managerial governance model along with a mix of ‘entrepreneurial’ and collegial values and norms.

In this paper, the archetype theory is used to help to clarify how this hybridism is characterised.

## Research design

Considering the framework just presented and the main purpose of this study, which aims to analyse a change in archetype within the HE sector, and specifically explore the hybrid model, as an ideal type in which Portuguese HEIs find themselves, we developed a qualitative study focused on a sample of six public Portuguese universities (Table 1). This set of universities includes institutions from the two different institutional models established by the RJIES and is composed of three universities (Aveiro, Porto and ISCTE) that first chose to become foundations and three universities that remained within the public institute model (Coimbra, Minho

**Table 1** Number of interviews held

	Rector	President of General Council	Administrator	Unit Director	Total
Foundations	3	2	2	5	12
Public institutes	3	3	3	5	14
Total					26



and Nova de Lisboa) and that are similar to each one of the foundation universities in terms of age, size and location. This institutional model was perceived as a way of bringing HEIs closer to private sector governance models, with a clear increased autonomy on behalf of the institutions. Significant differences at governance level were therefore to be expected, with foundation universities governance structures closer to the private sector governance model and to a managerialist archetype.

The research focus is set on both the level of governance and management structures, and on the level of the interpretive scheme. We considered it, therefore, interesting to analyse both the governance structures in place and the interpretative scheme on which it relies based on top and middle-level actors' discourses.

Actors with governance and management positions (at top and middle management levels) were interviewed with the purpose of identifying the set of values that stand out in their discourse, in order to assess in what ways the interpretive scheme underlying the traditional archetype characteristic of a public university has changed. Interviews were conducted with rectors, presidents of the general council, administrators and two directors/presidents of organisational units<sup>3</sup> (OU) per university, in a total number of 26 interviews, carried out between November 2013 and July 2014. All academic-managers interviewed were already in the university prior to the reform and had therefore closely followed the changing process occurred in their institutions, even if some of them were new in their position.

Singling out top and middle academic management actors<sup>4</sup> leaves out other institutional actors, such as academics with no management positions, administrative staff and students, whose perceptions could be relevant to have a better understanding of the whole interpretive scheme in place. This option, however, was based on the need to have the perception of those who have a role in university governance and therefore are closer to the existent structures and composition.

The interviews with the above-identified top and middle-level actors focused on the 2007 reform to the Portuguese HE system as the overall theme. Questions were asked about their perception on the need for such a reform, on what they considered to be the most important changes that had taken place in their institution and how they perceived them. Moreover, they were asked about specific changes occurring at governance level, as well as whether they considered there had been an approximation of public sector management techniques to those of the private sector, and also how they rated it. The study also included analysis of legal documents<sup>5</sup> from the six universities, in order to have information on how they organised themselves to comply with the law. The RJIES is a very prescriptive law, but it still left some room for institutions to take their own decisions with regard to the existence of some boards. The analysis of the way universities chose to rearrange their governance structures, both mandatory and optional, is very helpful in assessing how far they were willing to go in the managerialist way of running a university, and how have their structures changed to support a new interpretative scheme.

<sup>3</sup> By organisational units we refer to the departments/faculties/schools that constitute the universities considered in the study. Therefore the interviewed directors are heads of these units. Those in these positions are elected or appointed among academic staff. Per university two different scientific areas have been chosen.

<sup>4</sup> The Portuguese governance model of public universities does not introduce professional managers in important decision-making positions (such as the rector and the unit director/president). As such, these are teachers (all of them chosen among academics within their own institution), and therefore should be seen as academic managers.

<sup>5</sup> These legal documents refer to the university statutes published between 2009 and 2010.



Both the legal documents and the interviews were then analysed and subject to thematic content analysis (Bardin 2009), according to the dimensions and categories of analysis defined in Fig. 2.

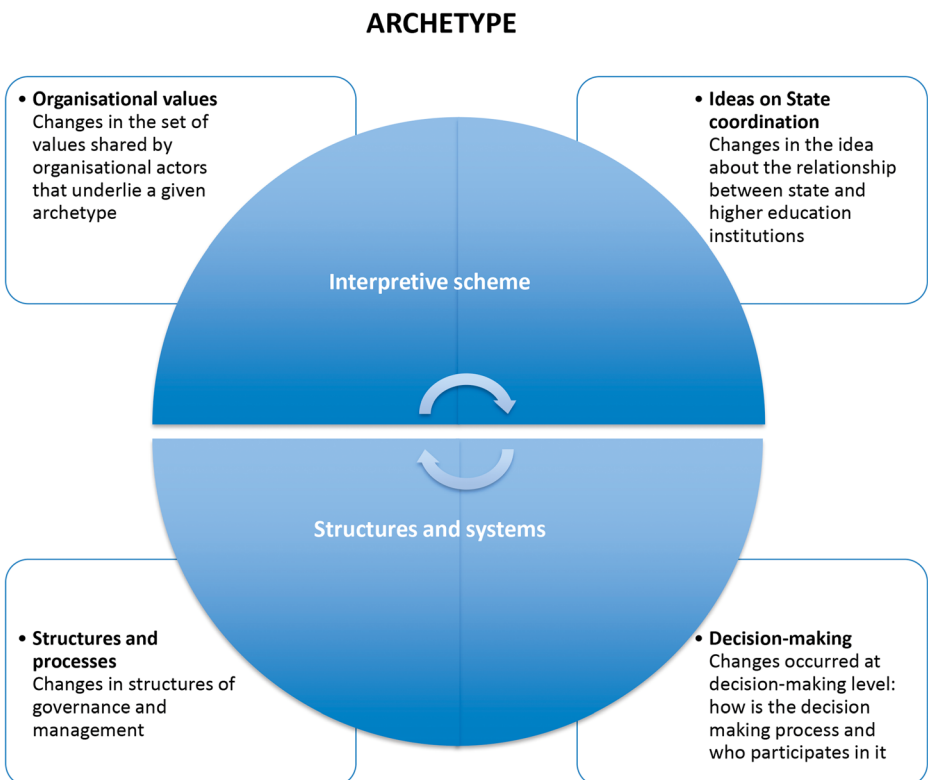
Figure 2 considers the reflexive relationship that structures and systems, and interpretive schemes share with each other (Brock 2006). Taking these as the dimensions for analysis, we further considered two categories per dimension as set out in Fig. 2.

## Changing archetype: mixed feelings

The 2007 reform marks an important turning point for Portuguese HEIs with regard to their institutional and governance models. University governance in its traditional collegial form has been challenged and changed in a way that had never occurred before.

While previous studies (Magalhães and Amaral 2007; Santiago and Carvalho 2004; Carvalho and Santiago, 2010b) already demonstrated the existence of hybridism resulting from these changes, our aim is to explore this hybridism and better understand its main characteristics.

Based on the two dimensions and the four categories of analysis previously defined, we will now explore the main characteristics of the new organisational archetype—a hybrid ideal type, which can be named as the efficient-collegiality archetype.



**Fig. 2** Dimensions and categories of analysis

## Structures and systems

The 2007 reform involved a series of important changes, from which we highlight: significant reduction of the number of members of the most important executive boards; representativeness of the different academic actors in government boards; power concentration on one-person boards; selection processes now also include appointment and co-option; external members were brought into top decision-making boards. These are the changes, at the structure and system level that will be analysed, according to the two identified categories (structures and processes and decision-making).

The RJIES brought significant changes in terms of the mandatory governance structures. Boards like the academic senate, which has a long tradition in universities' governance models as an important decision-making board, and the university general assembly cease to be mandatory and the choice to have a Senate is left to the institution. The main mandatory and executive boards are now the General Council, the Rector and the Management Board. Foundation universities add the Board of Trustees.

These governance boards gather a set of characteristics (regarding their composition and competence) that are much in line with NPM and managerialism principles. The Rector is, by definition, a single-person body, who has seen his/her powers greatly enhanced after the reform. The Rector no longer depends on decisions taken by an academic senate composed by a great number of academics to decide upon important matters. He/she can decide for him/herself and is therefore also held responsible for the decisions he/she takes. This is considered to be a more 'governable' way of governing a university, as decisions can be taken without being subject to lengthy discussions involving many participants—as perceptions of interviewed actors showed. But it does change a long-standing paradigm in universities' governance models, where decisions used to be taken in collegial boards and the Rector would then execute them accordingly.

According to the RJIES, the Senate is now an optional governing body of an advisory nature. The choice to keep it was taken by four out of the six universities: Coimbra, Porto, Minho and ISCTE. This choice, therefore, cannot be related to the chosen institutional model. It could have been expected that foundation universities would lean towards a more managerial governance model and would therefore choose not to keep a board like the Senate, where traditional collegial representativeness is still maintained. However, this is not the case, which leads us to that hybrid logic we have been writing about: even though some institutions chose an institutional model that takes them closer to managerial governance models, and even though actors were willing to accept smaller structures and less representativeness, institutions still chose to maintain a collegial board that was traditionally part of the university's governance model. This might happen for various reasons, but certainly the difficulty academic-managers feel in accepting being out of decision-making forums is one of them. One Rector confessed he would prefer not to have a Senate in his institution, but at the time of the decision his peers did not accept this. He is still working on the proposal to ban the Senate in the near future.

I even think that the law should have put an end to senates and all that stuff. I think that there are too many boards. [...] Here, for internal reasons, I had to keep the senate [...]. People were afraid to bring an end to it. Here it was a concession, negotiation pure and simple. Possibly, now when I revise the statutes I'm not sure it will endure. [...] (IUFr)

With regard to the Rector and the Director/President of the organisational unit, the reform implied a reinforcement of their power. These top and middle management level actors may

now take decisions on some matters without having to consult collegial boards and have their backing as it used to be done before. This power reinforcement in single-person boards is much in line with managerialist principles, and interviewees confirm it by drawing the parallel between the Rector and private sector CEOs.

The RJIES' model was influenced by business management when it distinguishes the figure of the Board of Directors and that of the Chief Executive Officer. The General Council is, in a way, a Board of Directors, with a chairman with few powers, which is the President of the general council. And then there's a CEO who is the Rector. So I think the RJIES was much inspired by business management models [...]. (UIPP)

Another aspect that has changed is the process of choice of both these top and middle management level actors. The Rector is still chosen through an election process. However, his/her election is no longer held among a large number of members of the academic community. Instead, the Rector is elected by the General Council, a much more restricted number of persons that also includes external members.

Concerning selection of directors of OUs, the RJIES only stipulates that when existent, it is the unit's collegial body that elects its director. Each institution further determines selection procedures. From among the six institutions of the study, the University of Aveiro is the one to have gone furthest away from the traditional election model: a selection committee consisting of the Rector and 4 other elements designates the director after a public presentation of his/her project. At ISCTE, the Rector appoints the unit's director according to the proposal of the unit's scientific commission vote. All other institutions have a collegial board that elects the unit's director.

The last category of analysis takes us to decision-making processes in HEIs and to issues related to collegiality. The RJIES introduced significant changes that affected collegiality. One of them relates to the introduction of external members<sup>6</sup> in top-level decision-making boards, namely the General Council and the Board of Trustees. We argue that this did not radically affect the collegial characteristics of the governance model in place, but the collegial balance has definitely been changed.

The Board of Trustees is the highest body of foundation universities' governance. It is made up solely by external members (5), appointed by the government on the recommendation of the institution.

At General Council level, the legislator opted for a shared governance model where both internal and external members have a seat. According to the law, at least 30% of the members must be external to the institution. The RJIES establishes that the majority (> 50%) of the members must be academics, thus preserving some degree of collegiality in the General Council. The way the six universities organised their General Council varies (see Table 2).

The academics' decisions may still prevail over the other members' opinions. However, the presence of external members may change the balance, and it is seen as having an effect over a

<sup>6</sup> For more detailed information on the external members taking part in the general council in the six public universities of this study see the work by Bruckmann in which the author identifies the professional background of 1st mandate and 2nd mandate external members. The study evidences a greater percentage of external members with business backgrounds in 1st mandate choices (Bruckmann, S. 2015. Shifting boundaries in universities' governance models: the case of external stakeholders. In E. Reale & E. Primeri (Eds.), *The Transformation of University Institutional and Organizational Boundaries* (pp. 163–184). Rotterdam: Sense Publishers.).

certain corporate spirit that used to characterise collegial boards. The analysis of the composition of the General Council shows us that only one institution exceeds the minimum percentage defined by law as to the presence of external members: Nova de Lisboa, with 33.3%. The ISCTE follows with 30.3%. All others do not attain the minimum 30% as required. This might indicate that the academy, in view of this new element in university's governance, was unsure of the benefits and decided on a more conservative way. This confirms that distinct institutional logics prevail in the governance model of Portuguese HEIs. Briefly put, the governance models changed into more top-down decision-making processes confirming that NPM transform HEIs into complete organisations (de Boer et al. 2007) assuming them as organisational actors behaving like a strategic and competitive actor (Krücken et al. 2013). However, in response to environmental changes, Portuguese HEIs transform their structures and governance models turning them into a top-down structure, but not in a uniform way. Actually, some institutions were more cautious in adopting law requirements by trying to maintain more collective structures of decision-making.

### Changing interpretive schemes

As previously stated, empirical studies in Portugal had already claimed that academics' discourses contain elements from both the 'collegial-bureaucratic rationale' and the 'managerialist rationale' (Magalhães and Amaral 2007; Santiago and Carvalho 2004; Carvalho and Santiago 2010b). We now aim to go further and, based on an archetype approach, try to understand the main characteristics of the interpretive scheme that sustains the new governance models.

NPM and managerialism principles convey the idea of the need to import into public organisations private sector values such as efficiency, efficacy, the importance of strong leadership roles for efficient decision-making, the idea of a much less interventionist state and of public organisations more accountable to society by imposing the presence of society members in governance boards. In order to understand whether changes occurring at interpretive scheme level are aligned with this managerial logic, university actors' discourses were analysed. Some rhetorical approaches aligned with the managerial logic were, in fact, detected.

Most interviewees mention 'efficiency' as an important value to be preserved and relate its improvement to the new governance model in place after the reform. The idea of efficiency is related by some interviewees to cost issues: efficient governance structures and processes are seen to be more cost effective to the institution.

[...] there was clearly a decision-making process that was not very efficient, with a significant cost [...]. [...] I did that cost analysis, just in terms of the people involved, in different boards. So, I think there was an inefficient internal process in terms of decisions, and that now the Rector's responsibility as a (single-member) board has significantly improved. (2UIPr)

When asked about governance issues that relate to democratic participation values, interviewees mostly seem to be accepting the new model that clearly reduces participation of academics in decision-making boards. The RJIES required of HEIs a reduction of the number of members in executive boards. This came to question a university governance that was widely shared among academy members, and thus to question the traditional collegial governance. Whereas some interviewees referred to the fact that members of the academy

**Table 2** Composition of the General Council

HEI	Profs/ Res	%	External members	%	Students	%	Non- teaching staff	%	Total
RJIES		> 50		≥ 30		≥ 15	Optional	–	15–35
UA	10	52	5	26.3	3	15	1	6.7	19
UP	12	52.2	6	26.1	4	17.4	1	4.3	23
ISCTE	17	51.5	10	30.3	5	15.2	1	3	33
UC	18	51.4	10	28.6	5	14.3	2	5.7	35
UM	12	52.2	6	26.1	4	17.4	1	4.4	23
UNL	11	52.4	7	33.3	3	14.3	–	–	21

now feel distant from discussion and decision-making on academy issues, most of them still consider this change very important for decision-making processes.

[...] we came to have a serious problem of representativeness of departments in the central boards. [...] there was a loss... and I hear my colleagues complaining a bit. People ceased to be heard, they practically ceased to exist. (1UFd)

Even when favourable to a change in the collegial model of university governance, some interviewees refer positively to the maintenance of some structures where democratic participation values still prevail, such as the Senate. They accept the idea that smaller boards work more efficiently, but they assume as important the existence of widely participated structures, even if only of an advisory nature.

What we need to understand is [...] if the number of members is enough to represent all sectors at university level. I have no doubt that it is insufficient. At school level I think the problem is not so critical. (4UIPd)

More than the representation of different actors in governance bodies, the values of democratic participation underlying collegiality are also related, by some interviewees, to the kind of decisions to be taken.

I think that agility had mostly to do with it: some decisions were taken by collegial boards and I think they shouldn't have been. [...] I think that what is strategic or what are political decisions [...] there, collegiality is very important... measures and steps have been taken that fly in the face of the more collective collegiate representation. (2UIPr)

Another aspect where a change of the set of values and norms in force can be seen concerns the inclusion of external members in the decision-making process and how academic-managers perceived it. Analysis shows that most interviewees consider the presence of external stakeholders positively. Even those who show some reservations as to their presence in certain instances, consider it positive to have external stakeholders in university governance boards.

[...] at institutions' level the idea of having external stakeholders is that idea of assuring [...] that strategic decisions are informed by an outside view compromised with governance. And I think that is, obviously, very important. (2UIPr)

The name *CEO* came out sometimes while referring to the Rector, and even when not explicitly stated, a comparison was similarly made between the Rector and a decision-maker

from the private sector, who was more empowered to take decisions on his/her own, and who had increased responsibilities. In this sense, these results contradict the findings of a previous study (Carvalho and Machado 2011) that concluded that the perspective of the Rector as *primus inter pares* was more dominant in South European countries. In fact, this may be interpreted as the result of an approach of the Portuguese HE system and values to those dominant in the Anglo-Saxon countries.

From the point of view of executive decisions, [...] the Rector is more a CEO, who has not got to wait on the formal agreement and meeting of a board [...] to take a decision. [...] there is a greater nominal responsibility on the person who is at the top. (2UIPr)

Generally, more empowered leadership roles, both at central and OU level, were rated positively by most interviewees. Nevertheless, it has to be admitted that this perspective of the Rector as a CEO was dominant among the interviewees. An actor with middle management functions mentioned pros and cons of these increased leadership roles, perceived as having on one side a gain in efficacy, and on the other side the danger of a bad management of this empowerment.

He has [more powers] but that speeds up [decisions] [...] in a more effective way. But as I say one must be careful with who is on that board. Everything has its pros and cons. (3UFd)

A change of the interpretive scheme is also seen by the changing ideas faculty members have on the role the State should have in HEIs' steering. Interviewees reported mostly that the RJIES would imply more autonomy (especially on financial issues) being granted to universities, and rate that as very positive and necessary, but, as the reform occurred at the time of the economic crisis in the country, this did not happen.

I think it did not change... That is, the RJIES would have changed it, but in fact little or nothing has changed because there is a clear distortion by the Ministry of Finance (2UIPr)

Therefore, in spite of the expectations brought by the law, interviewees claim there has been no change in the relationship between HEIs and the State and complain about dashed expectations of autonomy.

[...] in my opinion, today the problem of university management is the lack of autonomy, that was taken from foundations [...]. (1UFr)

We may therefore confirm from the analysis of the interviews that there is an ongoing process of change of interpretive scheme with regard to organisational values and ideas in the university context. Some new values are being increasingly institutionalised among academic-managers and indicate an evolving process from the traditional values and ideas about a university—which are about a university run by academics for the academics, identified by Becher and Trowler (2001) as ‘tribes and territories’—towards a set of more managerial-like values and ideas on university governance, which accept university governance should be guided by efficiency principles, and a greater involvement/intrusion from society on university issues. Nevertheless, some traditional values and ideas still prevail: although the Rector may be perceived as a CEO in terms of his/her duties and the power he/she is assigned, there has been a clear preference for a Rector as *primus inter pares*; the need that academics show for the existence of a governance board such as the Senate and therefore for democratic participation values, and the idea that decisions on academic matters should be taken by academics.

Data analysis reveals that the actors' perceptions on change in their institutions do not present two contradictory and incoherent archetypes. In fact, academic-managers do not present a simple perspective translating the substitution of the collegial by the managerial logic within their institutions. Academic-managers do not reject the idea that universities should be more efficient but simultaneously they also assume that due to its specificities universities should base their decision-making process on collegiality. In this sense, two main values seem to be assumed in the interpretative scheme of this archetype: efficiency and democratic decision-making. Somehow, this interpretative scheme sustains a governance structure which, albeit more top-down, incorporates both managerial and collegial features. Considering these results, one can say that the dominant archetype in HEIs can now be classified as an efficient-collegial archetype. Since previous empirical studies in the Portuguese context also based their conclusion on the existence of hybridism, one can raise the hypothesis that hybridism does not result from a transitional phase, as Greenwood and Hinings (1993, 1996) defended, but can, instead, be defined as a dominant archetype which can prevail in HEIs for a long time.

Table 3 briefly outlines the characteristics of the three archetypes: professional collegial bureaucracy, managerial archetype and the emergent archetype herewith named efficient-collegiality.

## Conclusions

Processes of institutional change have been widely researched, especially in public institutions due to the imposed changes in the institutional environment by the influence of New Public Management and managerialism. The same tendency was also acknowledged in HE studies. The empirical studies on institutional change in HEIs tried to understand how exogenous impositions affected the HE organisational field and organisations within it. A common predisposition of these studies was that macro-environmental changes would induce transformational changes in HEIs. However, if it is true that some authors arrive at a conclusion based on the substitution of distinct logics over time, by claiming the existence of a dominant entrepreneurial and managerial logic at the present (Reihlen and Wenzlaff 2016), the majority seem to agree that there is, in fact, no organisational transformation due to the fact that institutions have more top-down governance structures (Enders et al. 2008) but with the same professional organisation. Empirical studies previously developed in Portugal confirm the impossibility to assume the existence of transformational changes (Amaral & Magalhães, Carvalho and Santiago 2010b) since there is a hybridism with a combination of both collegial and managerial logics. Using the archetype theoretical framework, this paper tried to understand the specific characteristics of this hybrid model. The study concludes for the existence of an efficient-collegiality archetype. Changes both in structures and systems and in the actors' interpretative scheme seem to include both managerial and collegial elements. There is a top-down structure that allows the classification of these institutions as complete organisations but the governance structures are not exactly the same with some institutions opting to maintain more collegial bodies. At the same time, actors claim efficiency as a specific purpose for HEIs but aligned with democratic processes of decision-making. The efficient-collegiality archetype seems to be the result of the shifts promoted by environmental changes. However, one cannot discard the hypothesis that the claim for more democratic processes of decision-making represents an attempt to maintain institutional power within academic hands. On the other



**Table 3** Brief characterisation of the three archetypes

		Collegial archetype	Efficient-collegial archetype	Managerial archetype
<b>Structures &amp; systems</b>	Structures and processes Changes in structures of governance and management	High number of members in governance boards Academics are in charge of governance roles Election of governance positions in highly participated processes Collegial governing boards where all actors have a role External stakeholders absent or present in very small numbers Academic senate is the governance board where most important academic decisions are taken and the Rector has to abide by these decisions	Governance boards reduced but academics keep the majority of seats Academics have to share governance roles with external stakeholders Mixed selection processes: election and appointment might co-exist Some degree of collegiality is maintained but single-person governance roles are empowered External stakeholders' presence is mandatory but not majoritarian Academic senate may subsist but only with advisory power	Reduction of governance boards Professionalisation of governance roles Replacement of election by appointment of top governance positions Empowerment of governing boards / roles Mandatory participation of external stakeholders in governance boards Academic senate's role ceases to exist or its power is highly diminished Top-down decision-making processes
	Decision-making Changes occurred at decision-making level: how is the decision making process and who participated in it	Collegial decision-making processes	Top-down decision processes but some degree of prevailing advisory boards where important academic matters are discussed in a collegial way	
<b>Interpretive scheme</b>	Organisational values Changes in the set of values shared by organisational actors that underlie a given archetype	Collective decision-making Inclusivity Democracy Relationships Sense of belonging	Efficient collective decision-making, where the sense of belonging and participating is still dear to organisational actors, through accepting a stronger leadership	Efficiency Efficacy Leadership Excellence
	Ideas on state coordination Changes in the idea of how the relation between state and higher education institutions should be	Academic autonomy State steering	Autonomy with accountability	Accountability Decentralisation Managerial freedom

hand, the perceptions of the actors may correspond to what they define in their minds as the ideal situation. In this sense, the efficient-collegiality archetype can represent an ideal-type,

meaning an organisational model that institutional actors represent as combining managerial and democratic logics.

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