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Social Movements, Organizations, and Fields: a Decade of Theoretical Integration

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As Andrew Abbott (1992: 754) once argued in these pages, “organization theory always seems like a picturesque Kuhnian subfield. Paradigms come and go. Controversy abounds. People argue about ‘garbage cans’ and ‘populations of generalists’”. This interdisciplinary yet highly paradigm-driven body of scholarship was once dominated by attention to (boundedly rational) decision-making, efficiency, and tight coupling between organizational goals and procedures. It witnessed an almost revolutionary transformation during the Carter and Reagan administrations into a set of sometimes-competing, sometimes-orthogonal theoretical approaches, all of which emphasized environmental influences on the organization as a relatively open system. Loose coupling of elements came to be assumed, instrumental rationality was either pushed aside by analysts’ scope conditions or framed as highly contingent upon context, and inter-organizational relationships became a central empirical focus.

Challenging Operations: Medical Reform and Resistance in Surgery, by **Katherine C. Kellogg**. Chicago, IL: University of Chicago Press, 2011. 230pp. \$25.00 paper. ISBN: 9780226430034.

Contention and Corporate Social Responsibility, by **Sarah A. Soule**. Cambridge, UK: Cambridge University Press, 2009. 192pp. \$25.00 paper. ISBN: 9780521727068.

Fighting for the Future of Food: Activists versus Agribusiness in the Struggle over Biotechnology, by **Rachel Schurman** and **William A. Munro**. Minneapolis, MN: University of Minnesota Press, 2010. 262pp. \$22.50 paper. ISBN: 9780816647620.

Forging Gay Identities: Organizing Sexuality in San Francisco, 1950–1994, by **Elizabeth A. Armstrong**. Chicago, IL: University of Chicago Press, 2002. 272pp. \$30.00 paper. ISBN: 9780226026947.

From Black Power to Black Studies: How a Radical Social Movement Became an Academic Discipline, by **Fabio Rojas**. Baltimore, MD: Johns Hopkins University Press, 2007. 279pp. \$26.00 paper. ISBN: 9780801898259.

Inventing Equal Opportunity, by **Frank Dobbin**. Princeton, NJ: Princeton University Press, 2009. 310pp. \$24.95 paper. ISBN: 9780691137438.

¹I thank Tim Bartley, Colin Jerolmack, Andrew Martin, and Mayer Zald for feedback. The usual disclaimers apply.

Market Rebels: How Activists Make or Break Radical Innovations, by **Hayagreeva Rao**. Princeton, NJ: Princeton University Press, 2008. 205pp. \$24.95 cloth. ISBN: 9780691134567.

Social Movements and Organization Theory, edited by **Gerald F. Davis, Doug McAdam, W. Richard Scott, and Mayer N. Zald**. Cambridge, UK: Cambridge University Press, 2005. 434pp. \$42.99 paper. ISBN: 9780521548366.

Why David Sometimes Wins: Leadership, Organization, and Strategy in the California Farm Worker Movement, by **Marshall Ganz**. New York, NY: Oxford University Press, 2009. 344pp. \$24.95 paper. ISBN: 9780199757855.

Around the same time, social movement theory was undergoing a seismic shift in its own right. While organizational theorists were challenging the premises of Weberian rational systems models, social movement theorists were wrestling with the ghost of Durkheim found in theories of collective behavior. These emphasized the role of structural strain in producing the unstable psychological states then thought to be associated with collective action. Just as traditional theories of organization were making less sense in a context where companies and other organizations found themselves less autonomous and more at the mercy of the state and the professions, the suggestion that social movements were the result of structural strains in society did not resonate quite the same after the emergence of the Civil Rights, student, antiwar, and diverse identity movements of the long Sixties. Charles Tilly later distilled such criticisms in his (in)famous “Useless Durkheim” essay (Tilly 1981). Structural strains were replaced with concerns of resources, organization, political context, and the ability of collective actors to frame their message to both internal and external audiences. Analysts rediscovered the importance of Robert Michels’ (1911) principle of an “iron law of oligarchy” for understanding movement organizations, while either accepting its main implications and suggesting that activists should focus more on disrupting established practices than building organizations (Piven and Cloward 1977) or instead by reworking its insights and integrating them with the ideas of Philip Selznick to offer a new open-systems model of social movement organizations (Zald and Ash 1966).

Although scholars going back to Oberschall (1972) and McCarthy and Zald (1973, 1977) have recognized the importance—and, indeed, necessity—of acknowledging organizational processes within social movements, the past two decades have found the favor more than amply returned by organizational theorists applying the frameworks of social movement theory to understanding organizational and institutional change, the emergence of new forms and institutions, and diffusion processes. Organizational theorists have, in fact, found much to like in the very ambiguity of how a “social movement” should be defined. On the one hand, the term directs attention to the ways that organized constituencies—as primary or secondary stakeholder groups—make claims upon business organizations from outside established channels of influence. On the other, social movement theory can also be applied in a more metaphorical sense to draw analytic attention to the ways that organizational change-agents mobilize resources, frame issues, and capitalize on opportunities made possible by the specific configuration of power and authority within an organization’s “internal polity.” Regardless of which of these two conceptualizations is employed (or both,

as in Rao's *Market Rebels*, described below), the notion of an *institutional field* applies—whether as “fields,” “sectors,” or “populations” in organizational theory, or as “social movement industries,” “arenas,” or simply “social movements” on the other side—and has provided a fruitful linking mechanism between the viewpoints favored by each side.

The reasons behind this convergence reflect both the theory and the practice of social movements and formal organizations. With respect to theory, social movement perspectives offered partial solutions to the variety of puzzles that had preoccupied organizational theory since the 1970s in the traditions of organizational ecology, resource dependence theory, and the new institutionalism. For neo-institutional theory in particular—with its focus on how coercive, normative, and mimetic pressures in the institutional environment encourage organizational isomorphism—movement-based approaches provided a model that assumed a much greater role for agency, interest, and strategy than what was on offer in the dominant framework. Further, it could be used to elaborate upon the concept of “institutional entrepreneurship” and offer new insights into the resources, opportunities, and cultural frames necessary in order to build new institutions. Beyond the creation of new institutions, movement theories offered unique insights into the development of new organizational forms, a process that scholars previously saw as a result of technical innovation, exogenous shocks, creative destruction, or random variations selected for their environmental fitness; scholars therefore often neglected the cultural and political institution-building work done by social entrepreneurs. De- and re-institutionalization processes were a lesser concern in neo-institutional theories of organizations, and social movement theories also offered a way to reintroduce strategic action into how scholars think about institutional contradiction, breakdown, and renewal.

In practical terms, the rise of SM/OT theories reflects the concurrence of a diverse set of sweeping social changes. Large multinational firms have become transnational polities in their own right, thus inviting challenge by principled actors seeking reforms in the corporate practices that shape communities and nations. Social movements have rooted themselves inside a variety of institutional homes in the post-Sixties era of protest. Indeed, such groups are very active now in challenging corporations and other organizations beyond the state and offering up alternative possibilities for how to structure new institutional fields (and restructure existing ones). Major corporations are responding to external movement pressures by emphasizing commitments to Corporate Social Responsibility (CSR), creating new industries such as green energy markets, wind power, grass-fed beef, and sweatshop-free clothing. Empowered by the funds of large institutional investors, shareholder activists have made substantial inroads into companies. Whole industries are responding to both internal and external pressure with new models of transnational private regulation involving certifications through ISO 9000, Global Reporting Initiative, and various fair trade standards in coffee and other agricultural products. Nonprofits and civic groups are quite active in partnering with companies, and companies pay particular attention today to their position within local civic communities; for their part, many nonprofits and civic groups have imported practices of outcome measurement, accountability metrics, and other businesslike standards. Perhaps most significantly, companies themselves have, in the era of shareholder

value capitalism, come to resemble relatively loose and social-movement like coalitions of actors in network forms of organization.

Given these theoretical and practical considerations, this essay emphasizes three central ways that social movement and organization theoretic approaches have been fruitfully integrated in sociological monographs published since 2000. I begin by describing efforts at conceptual integration, continue by reviewing significant works on how social movements accomplish institutional change and create new fields, and conclude by discussing the importance of understanding strategy in movement fields and reviewing potential areas of future research. Because this is more of an article-based rather than book-based literature, this review necessarily omits many of the most significant recent contributions in the field.²

Theoretical Entrepreneurship

The full convergence of these two perspectives came about primarily during the past decade, although there were undoubtedly precursors to this line of thinking in early works by McCarthy and Zald (1973, 1977), Zald and Berger (1978), and in groundbreaking works by Clemens (1993, 1997) and Minkoff (1997, 1999). However, with the exception of Zald and Berger, earlier studies more often adapted the insights of organizational theory to social movement organizational processes. They tended not to consider how social movement theories can illuminate change processes in established fields including business, education, biomedicine, and other fields of organizational activity. Mayer Zald himself has written an interesting commentary on the “strange career” of this idea’s trajectory from early inattention to its recent “resurrection” (Zald 2005).

Gerald Davis, Doug McAdam, Richard Scott and Zald’s (2005) agenda-setting volume on *Social Movements and Organization Theory* helped to cement this emerging theoretical cross-pollination into a more fleshed-out agenda, and especially facilitated the diffusion of social movement perspectives into research on organizations. Many of these ideas were present in a number of other highly influential monographs published around the same time, including Hoffman’s (2001) book of corporate environmentalism, Binder’s (2002) study of social movement effects upon public school curricula, and Raeburn’s (2004) research on gay and lesbian organizing within the *Fortune* 500. The framework of social movements within organizations was an idea whose time seemed to have arrived.

The volume by Davis and colleagues emerged from a long series of conversations among a network of leading scholars from both traditions going back at least to the late 1980s. As the volume’s editors describe in the preface, a proposal for a conference along these lines was drafted by John McCarthy, McAdam, Zald, Woody Powell, and Neil Fligstein in 1989, but the request to Michigan’s Interdisciplinary Committee on Organizational Studies (ICOS) was later turned down. The dialogue was revived when Davis and McAdam worked on a collaboration at the Center for Advanced Study in the Behavioral Sciences at Stanford in 1998, resulting in a seminal paper on how social movement theory could be applied

²This includes especially articles published in a special issue of *Administrative Science Quarterly* published in 2008, as well as a number of innovative articles working at this intersection which have appeared in the *ASR*, *AJS*, *ASQ*, *AMJ*, *AMR*, *Organization Science* and other leading journals in sociology and organizational studies. For a review, see King and Pearce (2010).

fruitfully to the structure and evolution of network-based corporate forms in a postindustrial context (Davis and McAdam, 2000). Indeed, in that piece the authors argued that new forms of economic organization were “rendering traditional organizational theories less applicable to the realities of modern economic life” (ibid.: 231). In the same year—indeed, appearing directly adjacent to the former piece in the same issue of *Research in Organizational Behavior*—Rao, Morrill, and Zald (2000) published an article suggesting that understandings of organizations in markets should be viewed through the lens of social movement theory. They argued that the development of new organizational forms often involves a movement-like process in which collective actors first “de-institutionalize existing beliefs, norms, and values embodied in extant forms,” and then work to “establish new forms that instantiate new beliefs, norms and values” (p. 240). These works, then, helped to inspire further entrepreneurship on the part of both movement and organizational scholars, leading to conferences at the University of Michigan in 2001 and 2002. A selection of these submissions, as well as a few additional commissioned pieces, comprise the *Social Movements and Organization Theory* volume which has undoubtedly helped to set a new research agenda.

The volume itself contains a set of very strong contributions, and the summary essays that bookend the volume are especially valuable. These include an historical account of the evolution of these two traditions by McAdam and Scott, a provocative essay by John Campbell on shared mechanisms at work in both theoretical camps (and which, in my estimation, deserves to be assigned widely in graduate seminars in both social movements and organizational theory), and two concluding essays by Davis and Zald and Elisabeth Clemens. All of the chapters in the volume have considerable merits, and, indeed, many of the chapters have been cited widely in the seven years since the volume’s publication. Certain themes appear consistently across chapters: the processes by which social movements contribute to the erosion or deinstitutionalization of established practices, thereby provoking institutional change (Michael Lounsbury, Maureen Scully and Douglas Creed), ways of conceptualizing institutionalization (Marc Schneiberg and Sarah Soule, Elizabeth Armstrong), reasons to reconsider how social movement organizations are structured (McCarthy, Jackie Smith), examinations of contradictory institutional logics (McAdam and Scott, Lounsbury, Smith), and some initial discussions of how elites promote or resist change (Timothy Vogus and Davis, David Strang and Dong-Il Jung, and Zald, Calvin Morrill, and Hayagreeva Rao).

Each of these themes—perhaps with the exception of the examination of elites, a topic to which I return in the conclusion—is found in a variety of strong SM/OT studies that have been published in the seminal period of the past decade.

How Do Social Movements Destabilize Existing Institutions?

Social movement research has turned squarely toward the investigation of the outcomes of movement mobilization, and the examination of change in institutional fields has made for an excellent venue in which to study such outcomes. Explicating change among firms and industries has been the dominant thrust of this body of work, but changes in other fields such as education and health care have also come to the fore.

One such standout study is Sarah Soule's *Contention and Corporate Social Responsibility* (2009), which makes a significant contribution to the SM/OT dialogue by examining how collective actors challenge corporations using tactics outside conventional channels of corporate influence. Central to this effort is Soule's distinction between the "contentious politics" framework favored by scholars of social movements (which emphasizes the crucial mediation of the state in collective action) and the "private politics" approach of management scholars such as David Baron (which draws attention to "collective interactions between parties attempting to advance their interests that do *not* rely on the law, public order, or the state" (p. 30, emphasis in original)). Soule's study creatively integrates insights from both, showing how inattention to the state is a limitation for private politics scholarship—a considerable volume of anti-corporate protest also targets change in government policies—and yet the contentious politics literature also comes up short by neglecting to observe how corporations are, in many ways, polities of their own. She also argues that activists regularly shift the scale of their collective action either "up" (toward industries, nations, or even transnational contexts) or "down" (toward individual firms or local policies) for strategic reasons and/or in response to signals they receive about the existence of opportunities. Her empirical evidence relies upon a variety of sources: data on protest reported in *The New York Times* from 1960–1990 (the Dynamics of Collective Action data), evidence building from her earlier work on university divestment from Apartheid interests, and six case studies of protest against firms since 1990. The latter case studies include two each focused on anti-product campaigns, those that challenge a policy, and those that intend to tarnish a firm's reputation by suggesting negligence. Overall, she finds that activist campaigns do encourage greater corporate social responsibility, and that social movement campaigns often target both states and companies simultaneously in order to effect change through multiple means (see also Seidman 2007). Corporations seem to benefit by being the subject of protest, as Soule states clearly: "while they may not acquiesce to all claims made on them by activists, they do change. Thus, we can think of social movements and anti-corporate activists as important engines driving corporate innovation" (p. 144).

Social movements also generate change in business practices by introducing new cognitive frames with which organizational actors must contend as they seek to legitimate new products and expand their operations. One of the best recent studies on how social movements affect whole industries (and the cultures surrounding and permeating them) is Rachel Schurman and William Munro's *Fighting for the Future of Food*. Studying the movement against agribusiness's use of Genetically Modified Organisms (GMOs) in Europe and the United States, the book holds particular value for social movement scholars in how best to recognize exactly how "movements matter." The dominant focus in movement outcomes research has been on policy attention and such observables as the holding of legislative hearings, the passage of bills, and/or actions taken to implement a law. Although this study does address such questions—finding that activists in Europe were often much more effective in reshaping the regulation of agribusiness than activists were in the United States—Schurman and Munro contend that one of the most meaningful ways that social movements effect change is through the introduction of *new cognitive categories*. Indeed, they note that "the most profound impact of anti-biotech activism was to establish the distinction between genetically modified organisms and non-genetically modified organisms

as the defining social and technical fact... [Greenpeace's term "Frankenfoods" helped] to define all GMOs as unnatural, uncontrollable, and ultimately unpredictable" (p. 185). Thus, although one might argue that the industry "won" as GMO products have spread across the globe at a rapid pace despite social movement activism, this rich study suggests a different conclusion. By paying attention to dynamic interactions between industries, activists, external events (e.g., climate change, rising world food prices), national and international NGOs, and states, Schurman and Munro show how movements reshape industries' self-definition, narrow their scope of culturally acceptable actions and technologies in some respects (while widening it in others), and successfully exploit conditions of uncertainty in institutional fields.

Social movements also have the capacity to bring about new institutional orders in a variety of settings beyond capitalist enterprises. Recent studies have called attention to movements' influence in fields as diverse as biomedicine, legal education, military, religious orders, and science.³ Educational fields are often sites of contention, and Fabio Rojas' *From Black Power to Black Studies* (2007) shows how the social movement pressures of the Civil Rights Movement were incorporated into the university context in the form of new academic disciplines. Explicitly integrating social movement and organization-theoretic perspectives (and borrowing especially from the new institutionalism), Rojas deftly illustrates the analytic value of being somewhat more organization- rather than movement-centric. Utilizing a rich and diverse array of data sources, Rojas tracks the expansion of black studies from the Third World Strike at San Francisco State College in 1968 onward, first examining the durability of black studies programs in three cases in detail (University of Illinois-Chicago, University of Chicago, and Harvard). Next, he zooms out to look at the role of philanthropy in supporting such curricula, which he follows by providing a profile of the programs and faculty who staff them. Rojas shows that bureaucratic contexts become more relevant for achieving institutional change after the initial protests die down, but the evidence he presents is not reducible to such a straightforward institutionalization story. Instead, Rojas prefers a more sophisticated conceptualization of movements and their organizational targets as existing in a process of mutual coevolution. As he argues, movement ideas within organizational fields "must be compatible with the practices stemming from the broader political culture and the movement that sponsored the institution... [but] new organizational forms, to be viable within the movement, must often have some appeal to the activists who created them. For these reasons, movement-inspired organizational forms are often hybrids combining new politics with old values" (p. 214). Thus, bricolage and recombination are central mechanisms in the generation of institutional change.

Developing New Fields

Research at the SM/OT intersection over the past decade has accentuated not only how social movements facilitate deinstitutionalization and the breakdown of established

³See, respectively, Banaszak-Holl et al. (2010), Epstein (1996, 2007), Klawiter (2008); Teles (2008); Katzenstein (1999); Moore (2008). Although not all of these studies are framed in terms of the integration of social movement and organizational theory, all provide provocative new approaches for making sense of how social movements disrupt institutionalized practices, generate innovations, and reorient institutional logics in diverse fields.

understandings, but also how the production of new fields, the transposition of institutional logics, and the development of new forms takes place. This has been true both for those interested in studying social movement fields and also for those who look at new corporate forms, new industries, and new institutions outside the world of business.

On the movement side, Elizabeth A. Armstrong's groundbreaking *Forging Gay Identities* (2002) stands out for its cultural-institutional perspective on fields, which squares nicely with the political approach to understanding institutions earlier articulated by scholars such as Elisabeth Clemens and Neil Fligstein. Examining the development in San Francisco of historically specific identities and their evolution from the early "homophile" identity of the 1950s and early 1960s through the queer politics of the 1990s, Armstrong suggests that social movements are actors who create new fields and transform existing ones. Her thinking on the concept of institutionalization builds on both neo-institutional and social movement theories; a teachable point here is that movement scholars tend toward a somewhat naïve assumption that "the targeted field is institutionalized but the movement is not" (p. 13). In fact, just as neo-institutional theorists have noted about fields of formal organizations, institutionalization is a variable, contingent, and political *process* rather than a settled *outcome*. This is just as true for social movements as for established organizational fields, thus suggesting that analysts would do well to break down the division of labor in which movement theorists emphasize change while organizational theorists assert coherence and stability (*ibid.*). Further, and in accordance with this particular notion of institutionalization, her contribution goes beyond the dominant political process and resource mobilization traditions in social movement theory by finding a valuable role for organizations that are a part of the movement and yet are not explicitly political; the dominant template for these organizations was what she calls "gay plus one other function or identity" (p. 22). The formation of this field of organizations, which followed different political logics during distinct historical moments, reflected the "crystallization" of gay identities, yet this crystallization nonetheless remains dynamic, contested, and inherently contradictory.

New fields are also emerging among businesses, and indeed social movements can be seen as major forces behind organizational innovation. Exploiting the ambiguity of the concept of a social movement in a very effective fashion, Hayagreeva (Huggy) Rao's punchy and provocative *Market Rebels* (2008) examines how "activists" varying from product enthusiasts to grassroots organizers influence the development of new institutions. The book distills the fundamental insights of how six fields—the early automobile industry, beer brewing, French cuisine, contemporary *Fortune* 500 firms, chain stores of the 1920s, and German pharmaceuticals—found their innovations either buoyed or stymied by the mobilization of broadly-defined activist groups (respectively: amateur auto enthusiasts, microbrewers, advocates of Nouvelle Cuisine, shareholder activists, defenders of mom-and-pop stores, and anti-biotech activists). Building upon his earlier work in these and related areas, Rao shows, for example, that certification contests helped to legitimate the automobile and overcome early popular worries about safety and reliability. Then, following upon the collaborative work of Glenn Carroll on resource partitioning processes, Rao describes how microbrewers were able to exploit the concentrated market for beer by creating a new niche

for craft-produced brews. Similar accounts are offered for French chefs and shareholder activists, but the cases of mobilization against chain stores and pharmaceutical firms both illustrate how activists impose constraints on activity in the marketplace. What makes this study so noteworthy is that it shows not only how activists delegitimize institutionalized practices and generate new institutions, but also how the study does so with attention to the political and power dynamics that operate within institutional fields. Thus, a significant secondary contribution of *Market Rebels* lies in Rao's description of targets' strategic responses to activists; Rao shows, for example, that target organizations sometimes engage in sophisticated counter-mobilization campaigns to fight back against activist groups. Chain stores in the 1920s organized a pro-chain store campaign in coalition with the farmers from whom they purchased agricultural goods (pp. 131–5). This strategic aspect of field politics offers an additional new path forward for research at this intersection.

While all of the studies described above have demonstrated the significant potential of utilizing movement frameworks for understanding institutional change, a limitation of much of this work is that most devote insufficient attention to the micro-level dynamics by which activist entrepreneurs induce change. Katherine Kellogg's *Challenging Operations* (2011) suggests that neo-institutional theories, dominant social movement perspectives, law and society theories, and sociological approaches to particular institutions (in her case, medicine) all come up short in making sense of the forces that have the power to either facilitate or thwart institutional change. Her study investigates how, following the unsuccessful efforts of a medical reform coalition to lobby the federal Occupational Safety and Health Administration (OSHA) to impose limits on the number of hours worked by medical residents, the American Council for Graduate Medical Education (ACGME) voluntarily instituted a requirement in July 2003 that surgical residents work no more than eighty hours per week. She investigates the implementation of these requirements at three hospitals, finding that two of the three failed to implement the new guidelines, often complying in only the most symbolic of ways or even actively falsifying their timesheets (p. 6). Machismo, status, and career concerns loomed large in the countermovement through residents' resistance to the new guidelines, and this was reinforced by a culture in which residents described themselves as "Iron Men" working in a bodily "contact sport" (pp. 64–66). In the successful case of "Advent" hospital, reformers succeeded in part because of the presence of "transient reformers," labeled such because they were interns who were passing through the system and not themselves pursuing a career in general surgery (p. 169). Given this career trajectory, they were less vulnerable to the deleterious career consequences others could risk by supporting reform to work hours, and at this hospital they could also exploit the presence of other reformers in their internal coalition. The particular contribution of this study is that it shows clearly that social movement effects on organizations involve not just changing macro-level categories or institutional logics—nor merely forcing the passage of coercive new regulations—but require the face-to-face cultural work of strategically positioned actors within organizations in order to be effective. External forces may set the stage, but internal actors do the heavy lifting in order to translate mandates into real action.

The intricate interplay between external mandates and internal mechanisms of compliance is also on full display in Frank Dobbin's magisterial *Inventing Equal Opportunity* (2009).

Unlike much other work at the intersection of social movements and organizational theory that often implicitly deemphasizes the state, Dobbin's study shows that the force of the state is a powerful mediator in the relationship between movements and organizational change. But, in accordance with his vast body of influential research on the topic, Dobbin makes plain that the fragmented nature of the U.S. state—characterized as it is by evolving interpretations of the law among both courts and agencies at multiple levels of government, each of which are themselves open to public challenge and contestation—generates a considerable degree of uncertainty for organizations. Social movements and organizational change, then, are linked in part through the uncertainty engendered by the legal and regulatory environment. But they are also connected in a deeper way through the work of internal activists who help to guide organizations' interpretations of the law. Such was the case among the HR/personnel professionals, Dobbin shows, in their interpretation of the equal opportunity mandates inherent in President Kennedy's 1961 executive order on affirmative action as well as the Civil Rights Act of 1964. In part as an effort to make elbow room for their own professional project, "personnel experts promoted one round of compliance measures after another" from writing corporate nondiscrimination policies in the 1960s to developing more formalized and equitable hiring and promotion processes in the 1970s (which he calls "fighting bias with bureaucracy" in Chapter Five). They then rebranded their efforts in terms of efficiency and "diversity management" during the challenging Reagan years, ultimately fighting for new work and family programs in the 1990s and 2000s (pp. 14–15). By the late 1970s, the HR profession had feminized; Dobbin argues that these (mostly white) women carried the antidiscrimination cause forward in a fashion similar to professional or insider activists in other domains, such as environmental engineers' work in promoting corporate environmentalism and reproductive healthcare providers' position within the women's movement (p. 9). Still, the tension between movement and institution is palpable throughout the book, and, although generally not described in these terms, *Inventing Equal Opportunity* offers a variety of rich examples of how institutionalization processes transform both social movements and their targets of change.

Playing the Field: Strategy and Skill

Social movements rely on resources and opportunities in their political environment in order to be effective, but this sort of environmental determinism has come under challenge. Indeed, there exist a variety of theoretically informative cases in which social movements have been effective in facilitating change despite severe limitations in resources and opportunities. A consistent irony in scholarship on social movements and collective action is that one of the most dynamic and transformative aspects of society is often converted by analysts into a set of economic, organizational, and political constraints that limit capacities for change. Responding to these concerns, a number of recent studies have drawn attention toward the role of strategic action within both movements and fields. Marshall Ganz's *Why David Sometimes Wins* (2009) is the most important recent contribution.⁴

⁴But see also Fligstein & McAdam (2011) and Jasper (2006).

Ganz is in a unique position to underscore the significance of strategy among movement organizations. Ganz was a volunteer in the Mississippi Summer Project of the Civil Rights Movement in 1964, followed by sixteen years of work devoted to organizing farmworkers alongside Cesar Chavez and the United Farm Workers (UFW). *Why David Sometimes Wins* is an augmented version of the doctoral dissertation Ganz completed in sociology after returning to Harvard, and this nicely crafted book distills a lifetime of knowledge about the strategies and contexts of grassroots organizing to provide new and fundamental insights into how social movements can be most effective. How was it, Ganz asks, that Chavez and the National Farm Workers Association (NFWA)—later to become the UFW—were able to wrest from agricultural firms the first substantial farm labor contract in California history, while their significantly more wealthy and (apparently) more powerful peer unions (the AFL-CIO and the Teamsters) were not? The political environment was the same for all three unions, and a simple resource mobilization hypothesis would predict that the NFWA would be much less likely to win than their richer rivals. Central to Ganz's answer is the notion of "strategic capacity," which he defines as a combination of the motivation of leaders, access to salient information, and the "robustness of [leaders'] reflective practice" (p. 14). Importantly, Ganz's study of farmworker mobilization recognizes that the agency of leaders is itself rooted in their biographies and the organizational structures in which they are manifested. Individual life narratives, the social network ties of leaders, and leaders' willingness to apply tactics in new and unfamiliar ways all figure prominently here. In addition, strategic capacity also requires deliberative processes that amplify diverse viewpoints, utilize heterogeneous sets of organizational resources, and maintain accountability structures that limit the negative influence of bureaucratic routinization and maintain openness to new practices. From the perspective of the SM/OT encounter, the evidence in *Why David Sometimes Wins* is complementary to the findings of Dobbin's *Inventing Equal Opportunity*: uncertainty is feared by organizations of all types, but can serve as a resource for making change possible (see also Schneiberg and Soule's chapter in the Davis et al. volume). Sustaining an internal dialogue that is open to all viewpoints requires, Ganz notes, a high tolerance for ambiguity, but can increase capacity for innovation. And entrepreneurs can channel that uncertainty into creative solutions and organizational change.

New Directions

The integration of social movements and organizational theory has opened up a variety of productive lines of inquiry in the early years of the new century. Analysts have illustrated in diverse settings how social movements create uncertainty and deinstitutionalize established practices, and also how they resolve uncertainty through propagating new institutions and changing existing ones. Scholars are paying greater attention to questions of contingency, the cultural and political work necessary in order to generate institutions, and the transposition of institutional logics. The unique position of challengers with recognized standing in organizations is noted in these studies and in other recent works examining insider activism.⁵ More nuanced frameworks are also being developed for conceptualizing

⁵See especially Skrentny (2002), Banaszak (2010), and Katzenstein (1998).

the institutionalization of social movements. For institutional theorists in particular, social movement approaches have shifted attention toward interest and agency, long considered a blind spot.

Yet there are still new paths and opportunities available for the further integration of these perspectives (and their application to new fields of inquiry).

First and foremost, although recent works by Ganz, Jasper, and Fligstein and McAdam are helpful in recognizing the importance of strategic action within institutional fields, such an agenda is in need of even further elaboration. The politics of institutional fields involve not only the design of institutions in a fashion that favors the interests of incumbents while disadvantaging challengers, but they also involve ongoing negotiations between various players. These players, in turn, engage in strategic negotiation and power plays as they navigate the circumstances of changing environments. Some of the studies that I have described have recognized this, especially Rao in his discussion of pro-chain store mobilization and Kellogg in her detailed description of mobilization against reform in surgical practices.

Still, most scholarship at the intersection of social movements and organizational theory continues to view social movement actors through the lens of strategic action, while the organizations that movements target for change are often seen as strategic dupes left only with the option to either acquiesce or ignore the movement. But, as studies are beginning to show with greater attention, the targets of social movements have considerable strategic capacity of their own, and utilize their disproportionate resources to their advantage. Although it seems plausible that targets engage in strategic responses more on the basis of threats rather than opportunities, there are times when organizations including major corporations will go so far as to adopt social movement-like strategies of their own.

A further potential would be to integrate these new perspectives on organizational behavior with earlier literatures on the politics of the firm. Many of the studies described above suggest that although social movements engender political conflict within organizations, they eventually come into some sort of positive relationship with their targets of contention (whether as a “loyal opposition” for Rojas or as facilitators of innovation for Rao and Soule). Interestingly, these recent works suggest a rather different set of research questions than those found in studies of the politics of the corporation in the 1970s and 1980s. Such earlier studies, including many works by elite- and neo-Marxist theorists, emphasized the conditional power of large businesses to influence political decision-making through lobbying, electoral spending, inter-organizational network ties, and the like. Consistent with my earlier concern that strategic responses to social movement challenges are still largely missing from the dominant contemporary research frame (as is a more elaborate understanding of the role of elites in social movement fields), it seems long overdue to reintroduce the classic questions of political sociology into the SM/OT conceptual frame. Work by Mayer Zald and Michael Lounsbury (2010), Stephen Barley (2010), and myself (2009; forthcoming) all represent initial efforts in this direction, but much more work is needed.

Social movement approaches are also informing renewed interest among ecologists and institutionalists in the legitimation of institutional categories, which involve movement-like processes of mobilization, framing, and the endogenous evolution of collective identities and genres.⁶ On the other side, there appear to be a variety of yet-untapped potentials to connect institutionalist notions of culture and legitimation with frame analytic models from social movement theory. Much as organizations are both constrained and enabled by institutional logics and cultural categories, social movement groups need to strategically frame their claims and position their identities relative to categorical reference groups (these may often be others within the same Social Movement Industry). Here, scholars of contentious collective action could benefit by borrowing from those who have studied identities and categories among formal organizations. The extent to which a “categorical imperative” (Zuckerman 1999) exists among social movement organizations represents only one such possibility for further exploration.

There are also certain concepts from social movement theory that have not yet been successfully translated into theorizing organizational change, and foremost among these concepts is that of repression. The repressive capacity of the targets of social movements is an absolutely central topic for social movement scholars, but relatively little scholarship examines how non-state organizations repress activism through such tactics as firing activists, closing off spaces for activism through union-busting, and also through forms of “soft” repression such as public relations tactics or the facilitation of counter-movements. Although repression within non-state organizations is discussed in some part in the Kellogg, Soule and Rao books reviewed here (see also Walker, Martin and McCarthy 2008: 43–44), the topic of organizational repression of social movements deserves much greater attention.

The explosion of work on social movements and organizations is a testament to the remarkable set of institutional changes that are taking place in contemporary society. It also serves as evidence that perhaps these two literatures need not remain as separate as they have historically been. Yet, as Elisabeth Clemens (2005: 351) very poignantly put it in her concluding essay to the *Social Movements and Organization Theory* volume, the sort of boundary-blurring inherent in this scholarly integration can come with risks: “When tie-dyed activists and poor people’s marches are central to the imagery of a theory, can that theory be transposed to corporate boardrooms and back offices without doing fundamental violence to our understanding of both phenomena?” Although studies applying social movement perspectives to organizations have not fully put this worry to rest, they have shown in myriad ways how the innovations and challenges brought forward by social movements can be translated and repurposed in facilitating organizational change.

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⁶See, for example, Hsu et al. (2010).

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