

# The Institutional Politics of Change in an Outsourced Project

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## Abstract

This paper focuses on unique longitudinal research within a multi-vendor outsourcing environment in the European Defence Sector. It describes the unfolding relationship between vendors and a major defence organization as the vendors developed, implemented and then managed a human resource management (HRM) system. This paper examines the apparent paradox between the wide scale adoption of outsourcing and its relatively poor performance and outcomes. The research suggests this comes from a loose coupling between the rational logic of outsourcing practice and the interpretation and enactment by interest groups that is exaggerated by the imposition of fixed deadlines and strong contractual governance.

**Keywords:** Outsourcing, collaboration, institutional theory

## Introduction to the outsourcing paradox

Outsourcing is a co-operative inter-firm activity that involves the transfer of functions to external vendors, who manage the services for an agreed fee (Lacity and Willcocks, 1998). Strategic Outsourcing extends this idea to include the subcontracting of part or all of an organisation's internal systems to an external party that goes beyond just a 'simple service contract' and takes the form of partnership or strategic alliance (Altinkemer et al., 1994). Although outsourcing in this form shares many of the characteristics of an alliance it differs in several fundamental aspects: it is a contracted time bound service controlled by service levels agreements, resources flow mainly from vendor to outsourcer and the outsource supplier delivers the service under the control and governance of the outsourcer. From this perspective outsourcing as an institutional change involves the implementation of new routines and processes and the takeover and management of activities which are time bound within the context of a stable existing operation.

Outsourcing is a prevalent practice and over 80% of organizations will outsource at least one service; despite this widespread adoption there are evident performance issues and increasing dissatisfaction (Alexander and Young, 1996) and an apparent dichotomy as to why outsourcing is so prevalent but lacks real empirical justification (Rouse,

2007). In this regard outsourcing as a change process shares very similar poor outcomes to other large scale changes, inter alia: Business Process Engineering (Holland and Kumar, 1995), Merger and Acquisitions (Cartwright and Cooper, 1993), the chronic problems of ERP implementations (Scarbrough et al., 2008) and even major failings in large scale project implementations (Bronte-Stewart, 2009). This paper examines this paradox and suggests poor outsourcing outcomes are as a result of loose coupling between the rational logic of outsourcing implementation and interpretation and enactment by interest groups that is only exaggerated by the imposition of fixed deadlines and strong contractual governance often found in outsourcing agreements. This causes adaptation and compromise resulting in gaps between expectations and outcomes.

### **Outsourcing as an institutional innovation**

In this paper we adopt an institutional lens to consider how organisational routines and mechanisms constrain and shape the outsourcing implementation process within an inter-firm context to maintain stability and control (Zucker, 1987). Institutional theory focuses on the 'deeper and more resilient aspects of social structure' and is based on the idea that organisations consist of regular patterns and routines across social contexts and have organising principles or logics that operate within organizational fields that act to mediate actor action (Scott, 2004). Institutions are 'material practices or symbolic constructions' (Friedland and Alford, 1991: 248). The underlying assumption underpinning institutional theory is that organisations are deeply embedded in social and cultural practice and organizational structure and practices are 'strongly influenced by institutional demands' (Weiss et al., 2013: 3).

Outsourcing as a practice is predicated on the notion of standardization. Suppliers are contracted to provide a service and benefits such as cost reduction derived from the ability to implement standard processes grounded in their core competences across a wide client base. The basis of outsourcing therefore is the ability of vendors to pool the demand from their client organisations and to deliver standardised services. This idea is extended when considering ERP or other commercial off the shelf (COTS) software packages. However, implementation occurs between organisations that consist of diverse competing interests, coalitions of interest groups, who have potentially diverse goals and objectives for the activity. What is implied by this is that these diverse groups can expropriate and 'bend' major change programmes, such as outsourcing programmes, to suit their particular group needs (Berente and Yoo, 2012). Furthermore, complex inter-firm institutions can span several logics, such as the supplier and buyer perspective or even between departments within the same organization, and as a result have distinct organizational logics which may be responsive and adaptive to each other and can remain largely distinct.

According to Institutional Theory two processes are important during the implementation of a major organizational change, firstly - deinstitutionalisation or the erosion of existing institutional norms that occurs in parallel with the implementation of a change such as outsourcing (Seal, 2003) and secondly, institutionalisation whereby systems and procedures becomes the accepted norm and become integrated into organizational life (Currie, 2009). In order for effective change to occur old processes and systems must be replaced by the new, and the current 'taken for granted' ways of working and behaviours maintained by the isomorphic pressures of coercion, mimetic and normative systemic power need to be broken down and replaced. This work of

institutionalisation and deinstitutionalisation is carried out by actors who exercise episodic power to ‘create, transform, maintain and disrupt institutions’ (Lawrence, 2008: 173). Institutionalisation of change in complex technology or organizational contexts thus takes place in parallel to the process of deinstitutionalisation. From this standpoint bureaucratic stable organizations can inhibit change during system development (Currie, 2009) creating project inertia from the tension that arises between the ‘acceptance’ of the changes from the new system and a ‘replication logic’ seeking to maintain the status quo (D’Adderio, 2014). Furthermore, actors resist institutional control and agency by acts of mobilisation and the exercise of influence that imposes limits on the agency and control of institutions. These resulting acts of resistance range from passive acquiescence, compromise, defying or ignoring the change to manipulation and subversion that adapts the relationship between the actors and the institution (Lawrence, 2008).

Institutional control regulates the activities within desired principles and goals (Janowitz, 1975) whereas institutional agency is the work of actors to modify and change institutional practices (DiMaggio, 1988). Within this context resistance reduces or modifies the impact of both institutional agency and control. These three forms of power (control, agency and resistance) in the view of Lawrence (2008) form the basis of institutional politics and impact on all elements of the project during all phases: the scope of the delivery, the use of standards, delivery approaches, project control and techniques, the design of functional and non-functional requirements and the delivery and quality control of service. From this discussion the ‘interplay’ between these three aspects of power (represented in figure 1) within the organizational field can be described as the ‘institutional politics of a situation’ and is used as the guiding framework within this research (ibid).

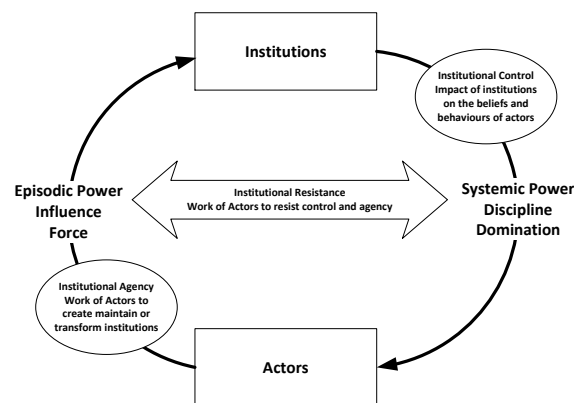


Figure 1- Lawrence, (2008) Institutional Politics and the Three Aspects of Power

There is a large body of research within the field of institutional theory which considers institutional effects and far fewer that adopt a process oriented approach (Currie, 2009). This paper responds to the call for more process-oriented organization research that expands the agenda to not only consider stability but explicitly study the process of institutional change (Currie and Swanson, 2009).

From the above discussion our research question is: What is the role of control, agency and resistance in the adoption of outsourcing within organizations?

## **Research design and data collection**

The research reported in this paper is a longitudinal, action research case study (Gummerson, 1991, Yin, 1994) using participant observation (Waddington, 2004), interviews and documentary analysis of contracts and substantial volumes of ongoing e-mail traffic (Rowlinson, 2004, May, 2005) focusing on the negotiation, initialization, implementation and service activities between four collaborative partners in the defence industry as they implemented a large-scale human resource application (HRMSys) for a defence client (DefCo). The IT requirements were contracted to a major IT systems house which outsourced complex IT requirements to a relatively small specialist software house in the UK, and the testing and validation of the software to a company (TestCo) in Romania.

The case was monitored for five years from contract bid and award in 2008 until September 2013 when the initial operating capability (IOC) delivery was accepted. Research data for the implementation phase included: semi-structured and structured interviews, documented workshops, research diaries, all contract documentation, design, planning, project management and control documents, internal memos and all monitoring reports. This data was stored electronically in archive folders covering the general project control (13 folders, 535 files), design (12 folders, 675 files), emails (4,921) and memos/reports (1389). All data, including extracted emails, was entered to a password protected database, nvivo10.

Analysis was based on identifying the themes of control, agency and resistance observed at identified critical moments during project implementation using the theoretical lens of power in institutions (Lawrence, 2008). We first focus on antecedent conditions and history of the two main protagonists, HRMDept and Personsoft, showing how their process of interaction led to an institutional logic that favoured informality and ad hoc delivery over professional project practices before going on to consider what changed this over the course of the project to a much more professional, management logic, as the organisation was forced to comply with these new norms (Oliver, 1992). The research took a process perspective and examined specific events where periods of activity or 'patterns of interaction may change as a result of specific encounters' (Robey and Newman, 1996: 250). The model is based on punctuated equilibrium, where quasi stable periods are adapted by specific incidents that may disrupt or transform the prevailing patterns of activities and give rise to patterns of power or resistance (van de ven and Poole, 1990). To understand the processes of institutionalization that occurred during implementation phase of five years it is important to first assess the antecedents to the project. Following this overview we will then go on to present key incidents and consider how institutional processes impacting at these points in time influenced the outcomes and contributed to project failure.

## **Findings**

### *Antecedents to the HRMSys project*

Personsoft, the provider of the software package, first started working with the human resource department of the organization (HRMDept) in late 1998 when version 3 of the human resource management system that would later form the core of the HRMSys application was first implemented. At that time formal IT support for the core mission of HRMDept was limited and no formal system was in the pipeline. The director of the organisation determined more substantial support was needed for its establishment

planning for both peacetime and crisis establishments, particularly as the processes across the organisation were diverse and uncontrolled. The major driver for the implementation was therefore to ensure coherent and consistent control over the management of postings and establishment for both military and civilian personnel across Europe. Conceptually this 'ideal' institutional logic shown by the HRM Department can be characterised as 'managerial' drawing on a 'business as defence' rationale and leads to practices such as the control and coordination of information across entities within the wider organization as its prime mission and purpose.

From the time of the initial implementation the relationship between Personsoft (a small company of around fifty people) and HRMDept can be characterised as highly cooperative with Personsoft responding rapidly and flexibly to requirements and the Department for its part tolerating the lack of formal techniques, such as testing and documentation. Furthermore, contracting for services was informal and the director of HRMDept acquired funding from various '*budget pots*' without recourse to a formal bidding process. Personsoft at this stage offered services on a '*time and materials basis*' determined by the amount of money available from the Department at that moment in time. The development process during this early period was highly interactive and developmental between the two organisations and the engagement process ad hoc and entrepreneurial. The institutional logic at this time was more characteristic of 'personal capitalism' and practiced with the consultant as technician, resolving issues pragmatically within a governance structure of the entrepreneurial tradesmen (Thornton and Ocasio, 2008).

This situation changed during 2006 when the HRMDept promoted the acquisition of a commercial off-the-shelf package (COTS) to replace the incumbent application to expand both the scope and usage of the application as well as to formally embed the processes and IT support it had developed within the organisation. As a consequence of the long-standing relationship and the desire to maintain tight control over the acquisition process HRMDept encouraged Personsoft to bid for this contract.

*"I suspected that the procurement process would have devolved naturally to one of the big ERP HR type of provider. The fact that we were incumbent, the fact that John was there, the fact that he had tailored to some extent the requirements to more explicitly follow the capability that they had already installed ...certainly shifted the goalposts towards us."* [Sales Manager Personsoft]

However the approach to go for a COTS solution had a profound implication for the incumbent provider.

*"...we were trying to sell a COTS product in a situation where the history had been essentially bespoke development."* [Service Director Personsoft]

This move towards a more formal structure, specified requirements and tight contracts can be interpreted as a change in the institutional logics within the organizational field from an 'ad-hoc' informal process to one more characteristic of 'professional project management' with a focus on tracking and delivery, compliance to standards and contract management.

*The formalization of HRMSys Project*

The project was split over four project phases at a high level conforming to the following activities: requirements and their validation, design with demonstration of compliance to non-functional and organizational standards, development and the creation of bug free software and finally controlled implementation onto the organisation’s infrastructure. Figure 2 illustrates the implementation phase of HRMSys and shows the project phases delivered mainly by Personsoft, and the ongoing management of the incumbent system by HRMDept the principal user group in the project. The figure also illustrates some of the sources of influence in the design and development of the new application HRMSys, especially the role of the incumbent, which was used as a reference system for much of the functional requirements.

High level incidents over the four phases were selected based on their salience and analysed in terms of power aspects demonstrated during the encounter. The breakdown into incidents and observation of power over the project main phases is shown in table 1.

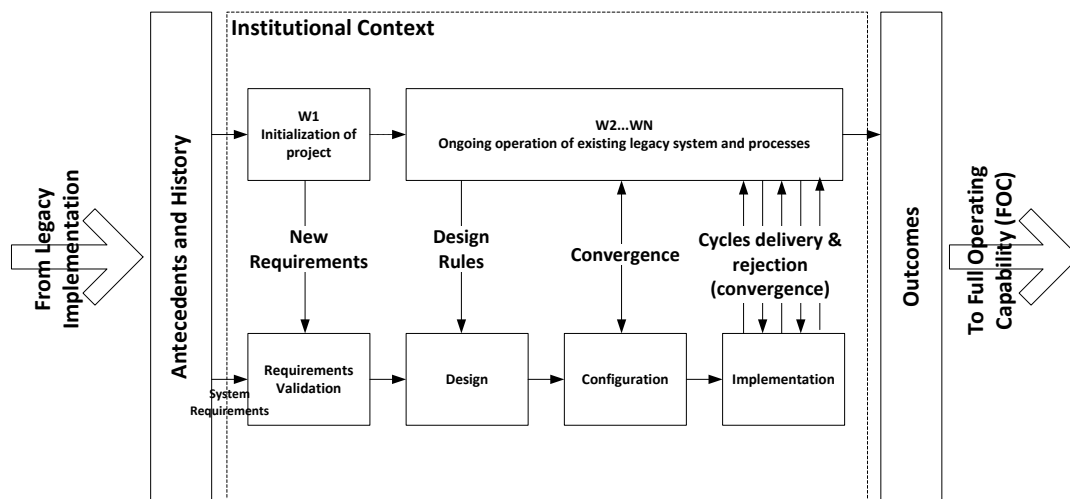


Figure 2 – The actors’ interaction during HRMSys: Author

Here the analysis from the requirements validation phase will be extracted to illustrate the link from the raw data to the analysis and thus demonstrate how the interactions reveal the nature of institutional politics.

*Defining and Controlling Requirements*

During the requirements phase (encounters 1, 2, 3 in table 1) the main work of the actors was to shape and modify the system requirements. At start-up the contractual terms and project timescales were re-emphasised by Agency, the contract owner, to the extent that interventions during the meeting emphasised compliance and the bounds on the suppliers and the potential sanctions should these be exceeded. This was particularly evident in the observation of the Contract Manager Agency:

*“...we have had cause to ask for liquidated damages in the past for projects that have exceeded the contract milestones” [Contract Manager Agency].*

Furthermore, the project elapsed time from bid submission to project start-up was in excess of three years and from supplier perspective there was a substantial risk of

requirement obsolescence and change. However during a supplier presentation covering the requirements validation process this was restated as *'not validation but verification'* [Contract Manager Agency] going on to suggest that new requirements recently introduced were expected to be *'already substantially covered'* [Project Manager HRMDept] in the application and no change in project scope was expected.

There are several illustrations of power shown by this short exchange, firstly, in terms of the boundaries of behaviour and locus of control, secondly, the restating of the expected power relationship between buyer and supplier. There is also a thinly veiled threat of the use of force to ensure compliance to the buyer's authority. It worked and the threat of *'liquidated damages'* was reproduced by project actors at every juncture when a chance of overrun occurred. Furthermore, the introduction of new requirements and how they could be offset against existing functionality in the incumbent application was to trigger a heated negotiation. Buyers insisting these could be included within the existing contractual scope at no additional cost whilst suppliers countering the new requirements were *'not included in the bid submission'* and must be paid for. This illustrates both institutional agency and resistance to these changes, especially from the suppliers attempting inter alia, to broker extended time for validation to show the impact on the cost and schedule and therefore justify increased costs.

Requirements validation (encounter 2) was a process nominally planned for two weeks in the first phase of the project. The main focus turned out to be an intense negotiation about how to include the new requirements introduced at the start of the implementation without extending the scope of the project in time or finance. The meeting was held at the supplier location and consisted of the 15 main project actors. Validation of the accepted bid requirements was not actually discussed and these issues pushed out to the design process phase later in the project.

There were two main processes going on during this negotiation. Firstly, the buyer introduced new requirements that were to be offset against obsoleted or already delivered functions. The process involved buyers repeatedly posing that the *'substantive functionality was already present'* [HRMDept Director] in the incumbent application or could be *'reasonably assumed'* [Independent test and validation consultant] to be delivered from the existing requirements matrix meaning the development time saved by using the incumbent application as a baseline could be offset against the new requirements at no extra cost. Furthermore, obsoleted and no longer needed requirements, further acted in the buyers view to reduce any potential project impact.

*"According to our interpretation, these changes should be cost neutral so no authorization for extra funding will be necessary, and thus (also) precluding a significant impact (on the project schedule)."* [Contract Manager Agency]

Against this suppliers proposed that the new requirement substantially altered project scope and had a fundamental impact on the timescales and delivery and used this position to counter the buyer's argument and to negotiate substantial relief on 'awkward', difficult to deliver functionality, within the current platform.

The overall process during the requirements phase and later stages revolved around this type of formal and informal negotiation and brokering, including the bypassing of the formal project meetings, to reduce or maintain scope, and these are processes of institutional agency and resistance. Institutional constraint via rules, processes and established norms of practice regulated the work of the actors in the HRMSys project and actors' agency modified and shaped the practice of outsourcing to suit sectional

interest. Furthermore, actors resisted the application of power and influence posing alternatives, negotiating compromises, demonstrating that the outcomes of this project were enacted in practice.

### **The causes of project failure**

The HRMSys only delivered an upgrade to the existing incumbent application along with a limited set of new requirements. Implementation scheduled for 10 months actually took 17 months and cost overruns for the suppliers were close to 100%. The root cause for this failure was a fundamental mismatch between the institutional logic of Personsoft that emphasised informality and collaboration in development compared with that required for this project which emphasised compliance and control more characteristic of a professional service company. This mismatch was seen throughout the project trajectory in terms of lack of documentation, continuous rework and poor coordination across suppliers.

Two main processes can be seen during the change that the software provider underwent throughout the project as it moved from an ad-hoc artisan to conform more to a professional services ideal. Firstly a 'replication logic' whereby the organization attempted to reproduce the old ways of working and relationships that would de-emphasise formality and rigour, and secondly incorporating the practice and processes coherent and compliant to the new situation. An 'institutional logic' that now favoured standardisation and compliance however constrained the entire project to move at the speed of adaptation of a core actor and reinforced inertia and prevented the project adapting to changing circumstances and requirements. Mechanism such as design rules, audits and acceptance testing characteristic of a formal managerialist 'project management logic' was at variance with the prevailing practice between the main protagonists prior to the project and forced the software supplier to undergo a fundamental change process. It is this mismatch between the prevailing and demanded underlying logics and the slow process of adoption to compliant practices that led to the relative failure of this supplier to deliver the software.

### **Conclusion and implications for practice**

The value of an institutional lens and a power perspective is that it moves the research agenda away from an overly rationalist view of how outsourcing proceeds as a management practice. Strong controls and tight contracts focused on 'safeguarding' or 'prevention' increases the control over suppliers but reduces the opportunity for cooperation in outsourcing engagements (Parmigiani and Rivera-Santos, 2011, Poppo and Zhou, 2013). Furthermore, processes put in place to constrain and regulate supplier's behaviour to reduce risk, minimise supplier opportunism and ensure success are founded on a purely rational deterministic perspective. This notion of technological determinism implicit in current outsourcing practice ignores the effects of institutional and actor agency and the resistance actors can mobilise to modify implementation processes to suit their own sectional interests. From this perspective we argue that outsourcing can be seen as a socially constructed and enacted process with parties able 'to escape' and resist contractual straightjackets leading to a patterns of power and conflict during implementation that unfolds as different parties interact and negotiate. From this standpoint outsourcing outcomes are processes of negotiation emergent over time the outcome of which depends on countervailing institutional pressures of stability and change - and the role of people and power within this is key.



Table 1- Analysis of Power Dimensions Observed During Project

Event	Location of the event in project: description	Main Interaction state	Power Dimensions Observed	Resistance Observed
En1	Requirements: Project start-up off meeting at Brussels and introduction of the scope change.	Discipline: Entry emphasised contractual commitments implied use of dominance threat of sanctions.	Dominance hierarchy strongly emphasised verification not validation stated. Maintenance of ambiguity	Focus on validation and lack of clarity implied in requirement and passage of time causing change from bid.
En2	Requirements: System requirements refinement and adaptation of scope with offset against existing delivered functions and the obsoleted requirements.	Agency: Buyers maintaining while suppliers seeking to extend scope changing the rules of engagement.	Influence especially around trading of requirements and recourse to previous relations	Brokering agreement by bypassing formal communication of project directly between users and Personsoft.
En3	Requirements: Contract amendment with list of requirements and impact statement stating new scope and timelines	Agency: Re-shaping the phases and content delivered putting off of difficult to out of scope of project.	Negotiation and shaping asking for more setting for less to maintain overall scope – some surveillance.	Feasibility of plan doubted by suppliers scope of documentation reduced – brokered changes not COTS.
En4	Design: Workshops and refinement of the technical design. Number and type of Use Cases, scope of documentation, restrictions in requirements and design rules agreed.	Discipline: Project management and professional service company rules of engagement emphasised	Emphasis on norms of documentation and design rules –boundary of acceptability defined.	Compromise and avoidance as supplier sought to reduce the burden of work – lack of formality was exposed.
En5	Design: Workshops directly between users and development allowed, creation process maps, flow diagrams, Use Cases and walkthroughs and story boards of concept functional delivery.	Agency: reshaping some limitations in access to user resources such as subject matter experts.	Influence and brokering rules – discipline expressed in denial of direct access between users and Personsoft.	Bypassing of formal structure and brokering agreement on approach - appeals to the past.
En6	Configuration: Software development of COTS package to cover new requirements - multiple releases due to poor software and ongoing changing requirements added to internal test and acceptance burden	Discipline: self-identification of deficiencies and strict control on releases to Buyer.	Enforcement of testing and formal project management processes to control software delivery.	Acquiescence following several failures and rejections.
En7	Configuration: Testing of release PMSys on FAT, Reference System (SAT) and initial UAT to check for user configuration compatibility – interrupted by failure re-run broadly successful.	Force: Plan demanded by Agency following test failure and breakdown of implementation process.	Strict surveillance on actor's re-emphasis on formal project control.	Acquiescence with some compromises to share work and minimise impact of failures.
En8	Configuration: Notice of delay from Agency invocation of liquidated damages due to design delays and FAT failure.	Force: Visible expression by Agency of authority.	Restatement of authority and dominance within institution hierarchy.	Denial of culpability between actors – temporary breakdown in project and exchanges of blame.
En9	Configuration: Rework application and correction of vital and critical security deficiencies from core application. Update of all documentation and creation of new baseline demanded.	Discipline: Weekly/daily on-line update and progress meetings and interaction emphasised control and enclosure.	Enforcement of testing and formal project management emphasised – surveillance and discipline.	Brokering acceptance, agenda setting and bypassing formal structure to wield influence.
En10	Implementation: UAT and acceptance testing including a re-run of security integration test and validation routines (IT&V) – new security failures. UAT test included a full regression over all the COTS core application.	Agency: Negotiating and brokering the test – support from Personsoft held at arm's length initially.	Influence by brokering and recourse to history between protagonists – some use of force to exclude.	Brokering changes in process to allow access and control of users. Some selflessness in free support.
En11	Implementation: Notification of UAT failure from full regression test at PCR 15	Force: UAT test revealed large errors in core COTS package going back years rejected by users.	'Settling of old scores' showed use of force against Personsoft	Denial of problems protests against approach adopted. Bypassing and appeals to authority.
En12	Implementation: Rework application and correction of vital and critical security deficiencies – update all documentation and preparation new baseline demanded.	Discipline: Bi-weekly update meetings and careful control of deliverables within required norms	Emphasis on compliance to project management professional norms – project hierarchy enacted.	Acquiescence with some compromises sought on criticality levels of security failures.
En13	Implementation: Installation and testing, new security errors and minor documentation changes. Two running patches allowed 7.1/7.2 – UAT testing supported to trap more user deficiencies.	Discipline: Actors operating within bounds of practice and project norms.	Emphasis on control and disciplined action with aspects of 'give and take' during negotiated exchanges.	Acquiescence with some aspects of compromise as supplier and users jointly reviewed software.
En14	Implementation: UAT acceptance and installation production environment with contractual agreement contents for patch rolling up all minor and significant deficiencies into two maintenance releases MR1 and MR2 post go-live.	Agency: Installation was supported by all parties - negotiations and shaping acceptance.	Influence and persuasion to gain acceptance – negotiation and brokering between actors.	Compromises with some avoidance activities to reduce impact of follow on changes – some trading.

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