PRE-PUBLICATION VERSION OF:

Herepath, A. (2014). In the loop: A realist approach to structure and agency in the practice of strategy. *Organization Studies*, 35(6), 857-879.
DOI: 10.1177/0170840613509918

First published on-line January 28th 2014.

Republished in the first virtual special issue of Perspectives: Strategy-as-Practice in Organization Studies.

In the loop: A realist approach to structure and agency in the practice of strategy

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Abstract

This paper introduces and illustrates a critical realist approach to the practice of strategy, combining Archer's stratified ontology for structure, culture and agency, with her work on reflexivity, to provide strategy-as-practice with an innovative theoretical lens. By maintaining the ontic differentiation between structure and agency this approach renders the conditions of action analytically separable from the action itself, thereby facilitating the examination of their interplay, one upon the other, at variance through time, in strategy formation and strategizing. It therefore offers the field a fruitful methodological means of exploring the increasingly complex empirical implications of some practice theoretical claims.

Keywords

Agency, critical realism, morphogenetic-morphostatic cycle, strategy-as-practice, structure

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Introduction

Strategy-as-practice (hereafter SAP) has emerged as a discrete stream within the broader current of practice-based theorizing in contemporary sociology (Golsorkhi, Rouleau, Seidl, & Vaara, 2010; Jarzabkowski, 2005; Johnson, Langley, Melin, & Whittington, 2007). In drawing upon sociological theories of practice, which redirect the conceptualization of strategy from the possession of an organization to an activity that its members perform, it has enriched the strategy research agenda (Jarzabkowski, Balogun, & Seidl, 2007). But in focusing the debate upon the micro activities constituting the real-time practices in the workplace a legacy of 'micro-myopia' taints the field (Vaara & Whittington, 2012, p. 28). This limits its potential to transcend divisions within strategy research and foster insights of greater salience for strategy academics and practitioners (Johnson, Melin, & Whittington, 2003).

Two pivotal reviews of the developing field highlight this dilemma. Jarzabkowski and Spee (2009) note that, despite consistent iteration in the research agenda, understanding of the links between macro societal phenomena and micro managerial actions remain underdeveloped within SAP. Furthermore, Vaara and Whittington (2012) have reasserted this stance and called for SAP to address agency within the broader context of the macro-institutional nature of social practices. For this burgeoning field to mature further it must therefore address one of the most fundamental issues in

contemporary social analysis: how strategy, as a situated, socially accomplished activity, is shaped by the interplay of structure and agency (Golsorkhi et al., 2010).

In Whittington's (2006a, 2006b) view, the central issue is to loop together macro extra-organizational societal forces with micro intra-organizational strategic managerial activities to determine their interplay in strategizing and not simply reduce these former forces to an undefined organizational context. But the mutual constitution of structure and agency, generally subscribed by practice theorists, rejects their manifestation as distinct entities (Orlikowski, 2010). The conditions of action are thus rendered analytically inseparable from the action itself. Therefore, though the 'interpenetration' of structure and agency may be explored in SAP, the analysis of their interplay, one upon the other, at variance through time, is obscured (Archer, 1995, p. 15).

In the spirit of Reed (1997), this paper seeks to rethink the interplay of structure and agency in strategy formation and strategizing. It presents a meta-theoretical debate that is informed by Archer's realist social theory, and employs her stratified ontology for structure (1995), culture (1996), and agency (2000a), with her later work on reflexivity (2003, 2007, 2010a, 2012), to offer SAP an innovative non-conflationary theoretical lens. An Archerian approach maintains the ontic differentiation between structure and agency. Hence, the ontological and conceptual entanglements, which obscure the analysis of their interplay, are unravelled. Indeed, structural, cultural, relational, and temporal dimensions are accommodated, together with their mediation to

the agent via reflexive deliberation or non-reflexive socialisation (habitus/habituation), thereby depicting social practice as the outcome of such nuanced interplay. This offers SAP a fruitful methodological means of exploring the increasingly complex empirical implications of some practice theoretical claims.

To illuminate this meta-theoretical debate, an Archerian approach to the practice of strategy is demonstrated through an empirical case study of strategizing in the Welsh Government (Herepath, 2010). Revealed through the 'naturalistic immersion' of the author's former role as a government strategist, this contribution is noteworthy for the privileged access, and thus insight, it offers the field (Greenhalgh et al., 2009, p. 397). The interplay of structure and agency is captured through strategists' perceptions of their 'social context and personal concerns' (Archer, 2012, p. 7). As role incumbents, each differently positioned and conditioned by structural constraints and enablements, their vested interests and discordant paths for strategic action emerge from the social position, role-based and institutional—professional and organizational—orientations of individuals and collectives (Archer, 2000b; Porpora, 1998).

An Archerian approach demonstrates that strategists' actions are moulded by deep structures, and the 'power to' and 'power over' that emanates from the hierarchical and bureaucratic relational array within which they are embedded (Lukes, 1974, p. 30). Yet this is counterpoised by the improvised 'in situ coping' of their reflexive deliberation (Chia, 2004, p. 33). This approach therefore penetrates to the crux of Whittington's

(2006a) notion of looping by portraying the acts of the strategist as simultaneously 'constrained and yet free' (Archer, 1995, p. 1). Moreover, it gives form to the latitude in the margins—that elusive cognitive 'entrepreneurial space' (Hoffman & Ventresca, 1999, p. 1374)—whereby the strategist perceives the boundaries of their strategic discretion and scopes out their leverage to play in alignment to, or indeed against, the situational logic that manifests within the strategic arena. As such, it may help the field glean insight into the fundamental question that surfaces when one reflects upon the complexities of strategy and strategizing—'why?'—why do strategists do precisely what they do in their daily praxis?

The remainder of this paper is presented in four sections. First, structure and agency in SAP are considered through the work of Bourdieu, Giddens, Heidegger and Schatzki. Archer's realist social theory, focused upon the morphogenetic-morphostatic cycle and her conceptualization of reflexive deliberation, is then discussed to define the paper's ontological and theoretical orientation. Next, an Archerian approach to the practice of strategy is demonstrated through the empirical case study. Finally, the discussion and conclusion consider the opportunities, benefits and challenges that this approach offers SAP, highlighting connections to the parent strategy field and process research agendas.

Structure and agency in strategy-as-practice

SAP studies informed by different practice theorists generally subscribe to the mutual constitution or 'central conflation' of structure and agency (Archer, 1995, p. 14; Orlikowski, 2010). For example, Bourdieu's (1977, 1990) theory of practice adheres to a non-Cartesian social ontology that attempts to dissolve the dichotomy of structure and agency by perceiving practice as the means through which the 'objective world and subjective actor come together' (Vaara & Whittington, 2012, p. 4). This stance centres on Bourdieu's conceptualisation of 'habitus' as a structuring mechanism—'a system of durable transposable [agential] dispositions, structured structures predisposed to function as structuring structures' (Bourdieu, 1977, p. 72)—that operates in a non-reflexive manner at times of 'contextual continuity', only shifting into a reflexive mode in moments of 'crisis' triggered by 'contextual discontinuity or incongruity' (Archer, 2012, p. 17; Bourdieu & Wacquant, 1992, p. 131).

SAP studies adhering to a Bourdieusian approach recognize the routine and recursive nature of practice embedded within institutional structures (Jarzabkowski, 2004). Furthermore, through Bourdieu's (1993) notions of field, agential position and capital (economic, social, and cultural) they illustrate the role of structure and agency in the power struggles, which defend or subvert practice, so highlighting the 'creative dimension' of habitus (Gomez & Bouty, 2011, p. 925). Yet Bourdieu's ontological position underplays the role of conscious thought and thus reflexivity—'the regular exercise of the mental ability, shared by all normal people, to consider themselves in

relation to their (social) context and vice versa' (Archer, 2007, p. 4)—in the development and operation of habitus (Elder-Vass, 2007). Consequently, when perceived through Bourdieu's (1990, p. 92) 'logic of practice', strategizing, comprising the 'actions, interactions and negotiations of multiple actors and the situated practices that they draw upon in accomplishing that [strategic] activity' (Jarzabkowski et al., 2007, p. 8), is viewed to operate under a 'logic in itself' without 'conscious reflection or logical control'. Yet the dynamic nature of strategy, beyond the bounds of crisis, demands intentionality and a rational, albeit fallible, strategic logic. This approach thus poses a risk of underestimating the role of reflexivity in strategizing.

Mutual constitution is also exemplified in Giddens' (1976, 1979, 1984) structuration theory and his conceptualisation of the duality of structure. Underpinned by the ontology of praxis, structure is understood 'paradigmatically' as a generic concept that manifests in the structural properties of social systems, being conveyed through rules and resources, which remain virtual until instantiated into action (Orlikowski, 1992, p. 404). In contrast to Bourdieu, Giddens (1984) attributes reflexivity to human actors, acknowledging that the enactment of practical knowledge demands reflexive monitoring to achieve a competent performance (Gherardi, 2000). Agency is therefore moulded by a practical consciousness and structures of signification (interpretive schemes), domination (resource allocative and authoritative), and legitimation (norms defining the moral order) drawn upon from the institutional realm.

SAP studies adopting a Giddensian approach have employed 'methodological bracketing' to examine praxis (the activity of strategizing), practices (strategy's routines, tool-usages, and norms), and the practitioners (the people engaged in strategy) in the profession of strategy as an institutional field (Whittington, 2006a). Informed by Reckwitz's (2002, p. 249) distinction between practice (*praxis* in German) and practices (*praktiken*), such studies depict praxis and practices as mutually constitutive (Vaara & Whittington, 2012). Giddensian approaches have also captured the human labour in strategy across tiers of management (Mantere, 2005, 2008), and analysed the patterns of strategizing behaviours through which managers shape strategy within the action and institutional realm (Jarzabkowski, 2008). But as noted by Whittington (2010, p. 114), the 'structural pliability' conceptualised by Giddens (1976, p. 75), wherein 'the individual could have acted otherwise' represents, for some, exaggerated scope for agential voluntarism (Archer, 1982; Reed, 2005).

The work of Heidegger (1927, 1954) has informed the development of practice-theoretical approaches (Nicolini, 2009; Zundel & Kokkalis, 2010). However, in SAP, it is his exploration of being, and notably his conceptualisation of dwelling and building modes, which have been employed to nuanced effect (2008 [1962], p. 78-90). Chia and Holt (2006) re-conceptualize agency and strategic action within a dwelling mode, in which agents enact their practical dealings with an absorbed intentionality, termed 'availableness', that is 'prior to mental representation and deliberate intentional action'

(Chia & Holt, 2006, p. 641). In this regard, they illustrate the immanent nature of strategy, depicting strategists' actions as in situ practical coping that manifests in a 'non-deliberate' and somewhat 'mindless' manner until confronted by failure whereupon a building mode ensues that catalyses conscious reflection and deliberate intention.

This is echoed in the work of Sandberg and Dall'Alba (2009, p. 1351) who draw upon Heidegger, Husserl and Merleau-Ponty to reveal how practice is constituted through the 'entwinement of life with world'. But in perceiving practice through the interplay of the lived body and ways of being, via purposive enactment that is imbued with meaning, with others, and things, within the social world, the interplay of structure and agency is obscured by their very entwinement.

The inexorable interweaving of structure and agency is conveyed by Schatzki's (2001) meta-theoretical approach. Positing the ontological primacy of practice wherein 'the social is a field of embodied, materially interwoven practices centrally organized around shared practical understanding' (Schatzki, 2001, p. 3), it expresses the intersection of individual activity, contextualised practical intelligibility, and the social order that is central to practice theory (Orlikowski, 2010; Schatzki, 2005). But in depicting social practices as the 'smallest unit' of analysis, an 'ontological entanglement' arises through which the ontic differentiation between structure, agency, and ensuing practice is lost (Orlikowski, 2010, p. 27; Reckwitz, 2002, p. 249). Once

more, SAP is unable to attain its goal of exploring how strategy is shaped by the interplay of structure and agency as this approach obscures their action as distinct entities, endowed with different causal powers, operating across time and space in the social world.

To explore the interplay of structure and agency this paper asserts that a non-conflationary ontological position is required. Hence one that: (i) recognises the ontic differentiation between social structures and agents; (ii) rejects both methodological and ontological individualism and collectivism; (iii) recognises the dependence of social structures upon agents, and the dependence of agents upon social structures; (iv) accords the temporal priority of social structures over any one agent, whilst acknowledging that structural elaboration post-dates the agency that gives it form; and (v) accommodates habituation to guide routine action and reflexivity to guide those actions which demand a more creative response in strategizing (Archer, 1995; Fleetwood, 2008; Hodgson, 2004). Thus, the approach adopted is Archer's realist social theory.

Archer's realist social theory

How strategy and strategizing are shaped by the interplay of structure and agency focuses the debate upon the 'great divide' of social theory (Fuchs, 2001, p. 25). Since the 1970s Archer has examined this issue, building upon Bhaskar's variant of critical realism to formulate her realist social theory. [See Bhaskar, (1978); Fleetwood &

Ackroyd, (2004) for an introduction to critical realism.] Archer therefore endorses a stratified ontology for structure, culture, and agency, refined through her later work on reflexivity, which she combines with the temporal dimension of social transformation or reproduction to produce the *morphogenetic-morphostatic cycle* (Archer, 1995).

Archer adopts the concept of morphogenesis from Buckley (1967, p. 58); who, from a systems theory perspective, used this notion to capture 'those processes which tend to elaborate or change a system's given form, structure or state'. Morphogenesis conveys that society has no pre-set form. Indeed, it recognises that society takes its shape from, and is formed by, agents, through the intended and unintended consequences of their activities. This stance, Archer (2012) asserts, laudably wards off charges about the reification of structural and cultural emergent properties. Hence this 'unlovely term' depicts the 'radical and unpredictable re-shaping of society as a consequence of the interplay of structure and agency' (Archer, 1995, p. 75). Morphostasis, in contrast, refers to those 'processes which tend to preserve or maintain a system's given form, organization or state' (Archer, 1995, p. 166).

As illustrated in Figure 1, Archer embraces the notion that structure and agency are different emergent strata of social reality that work across different tracts of time. The flow of a morphogenetic-morphostatic cycle is therefore broken up into three phases: *structural conditioning* (T^1-T^2), *socio-cultural interaction* (T^2-T^3), and *structural reproduction or elaboration* (T^3-T^4). Hence, Archer argues that the analytical

differentiation between structure and agency is made possible by two propositions: 'that structure necessarily pre-dates the actions which transform it and that structural elaboration necessarily post-dates these actions' (Archer, 2000b, p. 465). In this manner, Archer employs 'analytical dualism' as the guiding methodological principle underpinning her non-conflationary social theorizing (Archer, 1995, p. 15; Stones, 2001).

By maintaining the ontic differentiation between structure and agency the conditions of action are therefore rendered analytically separable from the action itself, so enabling their interplay, as opposed to their mutual interpenetration, to be explored. This approach helps to clarify how structural and cultural conditioning effectively influences socio-cultural interaction, and what forms of social interaction foster structural and cultural reproduction or change. Consequently, for SAP, the problematic issue of 'how actions reproduce or modify institutions over time' may be illuminated (Jarzabkowski, 2008, p. 623). As Archer (2012, p. 54) contends, the point of the morphogenetic approach is precisely to specify the 'who's who' and 'who does what', and, one might add, 'when and why' in social transformation: a goal of manifest salience for SAP.

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Figure 1

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As illustrated in Figure 1, at T^1-T^2, structural and cultural emergent properties shape the situations in which strategists find themselves, conditioning their actions, though not in a deterministic manner given their own emergent powers. During this initial stage of the mediation of structure to agency, these influences manifest as *first-order emergents*, encompassing: the strategist's involuntaristic placement within the broader social context and role array, their vested interests, the opportunity costs associated with different courses of action, their perceived interpretive freedom and scope for strategic directional guidance. Such first-order emergents impact differently upon each agent, enabling or frustrating the attainment of their strategic projects in relation to their social bargaining power. Consequently, the analysis of how structural and cultural emergent properties impinge upon agents by shaping the situations which they confront is stratified across three levels (Archer, 2000b).

First, social position, which pre-groups collectives of agents into the privileged and underprivileged, categories which are not fixed but are mobile over time. In this regard, Archer identifies 'corporate' and 'primary' agents. The former encompasses 'those who are aware of what they want, can articulate it to themselves and others, and have organized in order to get it' (Archer, 1995, p. 258). Such self-conscious vested interest groups therefore act strategically, engaging in promotive organisation and articulation of their interests to become party to negotiated societal transformations, so shaping the context for all actors. The latter, by contrast, are 'inarticulate in their

demands and unorganised for their pursuit' and so remain excluded from this debate (Archer, 1995, p. 185). Second, roles, each necessarily and internally related to others (e.g., chief executive-employee) and to associated artefactual, social and conceptual resources (Fleetwood, 2005). Finally, the 'cultural logics' of the institutional domain, which, in guiding practice, mould professional and organizational arenas (Mutch, 2009, p.150). Therefore, in addressing conditional influences in this manner, the contextual constraints and enablements imposed on the social position of the strategist are exposed (Luckett, 2008).

The potential bargaining power of collectivities of agents, and their resultant negotiating strength, fosters disparate groups (the cabals and coalitions found in any strategic arena) which are caught in a battle of hegemonic and counter-hegemonic wills. For Archer (2003), this represents the second stage of the mediation of structure to agency, and addresses how strategists, confronted by contextual conditioning, exercise their subjective and reflexive mental powers to formulate their strategic projects, individually and collectively. Throughout a given strategic episode, those experiencing exigencies seek to eradicate them, whilst those experiencing benefits seek to retain them: an argument that resonates with Bourdieu's (1993) notion of the field and to the manifestation of power therein. But though Archer (2010a) argues that all such transactions are fuelled by power, contra Bourdieu, she also reasons that they are attenuated by agential reflexivity and self-monitoring to provide directional guidance.

Archer (1995, p. 216) states that this array of influences gives rise to four potential *second-order emergents*—'necessary complementarities, necessary incompatibilities, contingent complementarities and contingent incompatibilities'—which foster the accompanying *situational logics* of protection, correction/compromise, opportunism, and elimination. Hence at T^2-T^3, the situational logics held by such groups contort the strategic arena, motivating different forms of strategic action by predisposing each group of actors to see their interests best served by defensive, concessionary, opportunistic or competitive modes of interaction. Therefore, it is the situational logic ultimately brought to pass through strategic negotiation—be that via power induced compliance, reciprocal exchange, or the harmonisation of desires—that 'represents the generative mechanism of morphogenesis or morphostasis' (Archer, 1995, p. 218).

At T^3-T^4, the final stage of the morphogenetic-morphostatic cycle, *third-order emergents* impact within the strategic arena. These arise from the 'relative synchrony, congruity or incongruity', between structural and cultural emergent properties (Archer, 1995, p. 218). This therefore captures structural and ideational differentiation, together with the re-grouping inherent to the power play of strategic actors. Hence, when a morphogenetic cycle is completed, as structural relations are transformed so is agency in an act of 'double morphogenesis' (Archer, 1995, p. 74). Furthermore, 'triple morphogenesis' takes place in the emergence of social actors, who are forged from

agential collectivities in relation to the array of organizational roles which are available in society at that specific point in time (Archer, 1995, p. 256). Therefore, as an established methodological complement to critical realism—and as an innovative lens for SAP—an Archerian approach provides both an explanatory framework for examining the interplay between structure and agency, and a tool kit for developing the analytical histories of emergence of particular social formations and strategies (Archer, 2010b).

In her later work, Archer has refined her conceptualisation of the mediation of structure to agency. This, Archer contends, is undertaken via two mechanisms: habituation, guiding routine action, and reflexivity, guiding those actions which demand a more creative response (Archer, 2010a). However, it must be acknowledged that Archer's primary focus is directed toward the reflexivity of self-conscious social subjects committed to the achievement of their personal projects. In this regard, Archer theorises reflexive agency as originating within the *internal conversation* of the individual's domain of mental privacy, and posits that it is this that has causal efficacy towards ourselves, our society, and the relations between them (Archer, 2000a).

For Archer this final stage of the mediation of structure to agency occurs through three stages: *discernment*, the preliminary review stage of an issue of concern, where reflective retrospective and prospective thought informs practical action; *deliberation*, involving the ranking of such concerns against others, and *dedication*, entailing their

prioritisation and alignment to foster a 'fallible yet corrigible' commitment to a chosen path (Archer, 2000a, p. 237-8). The reflexive agency informed by the internal conversation thus represents the explicit interplay of social context and personal concerns. Therefore, in addition to offering SAP an explanatory framework for examining the interplay between structure and agency and their outcomes in strategy formation, Archer's realist social theory also provides an innovative means to address Whittington's notion of looping in strategizing.

An Archerian approach to the practice of strategy

In this section, an Archerian approach to the practice of strategy is demonstrated through a case study of strategy formation and strategizing in the Welsh Government. Accompanying case information and data sources are summarised in Table 1.

Orientation to the case

The public inquiry into the Bristol Royal Infirmary (BRI)—colloquially know as the Kennedy Report—marks a watershed in the development of healthcare services across the United Kingdom (UK) and forms the antecedent context to the case. The Report's recommendation that: 'continuous professional development, being fundamental to the quality of care provided to patients, should be compulsory for all healthcare professionals', positioned such development on the strategic agenda of the devolved National Health Service (NHS) (Kennedy, 2001, p. 447). The Welsh Government (2002), in publishing its response to the report, set out a policy commitment for a new

workforce and organizational development strategy for the Welsh NHS: the focal strategy considered in this case study.

Structural conditioning (T^1-T^2), socio-cultural interaction (T^2-T^3), and structural reproduction or elaboration (T^3-T^4) fostered through the actions of four groups of agents tasked with the development of the strategy is depicted. This centres upon: (i) the *administrative core*, senior civil servants with direct managerial responsibility for the development of the strategy, wherein the author then functioned as the principal strategist; (ii) the *policy leads*, senior civil servants who were drawn from an array of professional orientations to guide the strategy's formulation; (iii) the *NHS managers*, chief executive officers from NHS Wales' then Trusts and Local Health Boards; and (iv) the *inner elite*, a cabal, composed of the chair of the board within the administrative core, one policy lead, and one NHS manager.

As indicated in Table 1, formal board meetings, informal meetings and the impromptu daily banter of strategizing comprise the main data sources. These were analysed through abstraction and retroduction, individuating one or more aspects, components, or attributes, and their relationships in strategizing, in order to understand them better (Danermark, Ekström, Jakobsen, & Karlsson, 2002). As summarised in Table 2, initially, structural conditioning was analysed by examining United Kingdom and Welsh healthcare policy to assess the impact of the emergent strategy. Hence, conflicting dominant and subordinate institutional logics, which foster the organizing

principles for these strategic arenas, were defined (Mutch, 2009). This preliminary analysis scoped out the first-order emergents within the strategic arena.

Then the relational structure of the Welsh Government board was considered across: (i) social position, role, and the organizational and professional composition of the board's membership; and (ii) the role-based power disparity between the players on the board. Structural, cultural and agential conditioning was thus examined as it manifested deep within this bureaucratic and hierarchically organized social space, thereby revealing second-order emergents. Socio-cultural interaction was analysed through the practitioners, praxis and practices of strategy. However, attention was placed upon the strategic practices orchestrating hegemonic control within the board, and that of a broader array of Welsh stakeholders, exposing the differing stances to strategic negotiation adopted by each cabal or coalition (Joseph, 2000). Finally, structural reproduction or elaboration was examined, and attention placed upon the aftermath following the strategy's approval by the board. This analytical process is further reflected upon in the discussion to this paper.

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Table 1 and Table 2

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Structural conditioning (T^1-T^2)

In the aftermath of the Kennedy Report, structural and cultural change impacted, conditioning the actions of those in the strategic arena. Importantly, medical autonomy and professional dominance had been eroded by political and public disdain, precipitating the increasingly stringent modes of regulation and revalidation that are now imposed upon the UK's healthcare professionals (HMSO, 2007). In the strategic arena, the diminished standing of the medical profession served to undermine the aligned group of policy leads.

Other groups of agents were, however, confronted by different challenges. The administrative core and policy leads drawn from a broader array of professional orientations, collectively tasked with the development of a distinctive Welsh policy agenda, were constrained by UK Government's reserved powers (Greer, 2004). In relation to the focal strategy, this primarily arose from the UK Government's control of the regulation of the healthcare professional workforce (HMSO, 2007). Indeed, the contemporary development of a new UK wide pay and performance system for NHS Staff—Agenda for Change and the Knowledge and Skills Framework—limited the scope of the emergent strategy (Department of Health, 2002). Furthermore, NHS Managers were preoccupied with the protracted structural reform of the Welsh NHS that commenced with devolution (Drakeford, 2006) and thus faced organizational mergers and the threat of redundancy or redeployment.

As summarized in Table 2, the different situations in which the four groups of agents now found themselves in relation to such change, and their social position, role-based, and institutional—professional and organizational—stance toward the development of the strategy, created dynamic space for strategic negotiation. Consequently, the strategic arena became, albeit fleetingly, more malleable.

First-order emergents*: *The administrative core

The Welsh Government's commitment to the focal strategy directly impacted upon the involuntaristic placement of the inner elite in the administrative core, the appointed chair of the strategy's board, for whom a Ministerial order in the form of a 'JDI'—*just do it*—weighed heavily.

> 'The Minister wants action—we need to be seen to be responding to the report [Kennedy, 2001] in a positive manner—we've got a JDI.'
>
> Inner Elite, Administrative Core: Informal discussion with principal strategist 2003

Their vested interests lay in the development of the strategy in alignment with the Welsh Government's centrist and bureaucratic set of values and beliefs, and the broader policy commitment to collaborative public sector partnership working which, though ostensibly fostered through trust and co-operation, was cemented by quasi-statutory legal frameworks (Quinn, 2002). Their strategic agency was therefore directed to meeting Ministerial demands with due obedience. Hence, their role-position to the Minister exemplified an internal and necessary relationship, and key structural emergent

property, compatible with the strongly institutionalized and overt bureaucratization of this government/public administration context (Horrocks, 2009). The interplay of their conditioned situational interpretation and agential reflexivity during the first stage of the mediation of structure to agency, expressed below, forwarded the discretionary judgement that the strategic arena offered only limited scope for change that would be best served through brokering a path of compromise.

> 'You have to appreciate that we can't just do what we want...[long pause]... the scope of this strategy is limited, and you've got to understand that before we start. We're constrained—Agenda for Change and the Knowledge and Skills Framework are placing a significant burden on Directors of Human Resource across the NHS, and this strategy will just appear to be an add-on—and we've got to address the policy commitment to partnership working. This is going to be about determining how far we can go, how we can keep the key players on board, and how we get them to agree. It's about compromise.'

Inner Elite, Administrative Core: Informal discussion with principal strategist 2003

Given the gravitas of their role-position and the institutionalised adherence to a traditional bureaucratic hierarchical corporatism, attenuated by professional collegiality, that characterised the strategic arena, their strategic stance delimited that which could be

entertained by the principal strategist and others positioned within the administrative core.

First-order emergents*: *The policy leads

Such bureaucratic hierarchical corporatism was, itself, conditioned by the involuntaristic placement of the policy leads. For some, the strategy's formation represented a 'concrete hegemonic project' and thus a strategic opportunity to be leveraged (Joseph, 2003, p. 129). But this strategic stance was far from universal. Pivotally, for the policy leads for medicine, the emergence of the strategy threatened the continuation of their privileged access to funding for postgraduate professional development.

> 'Medical workforce planning has always been sorted at the level of the [Welsh Government] and arguably at a UK level through the Royal Colleges for the planning of numbers within each specialism. So the numbers, control, and funding of this has been, I guess you'd call it, "ring fenced". It's a "special relationship". It's protected from the churn in the wider NHS, and this relationship can't be eroded. Funding can't be diverted to other ranks of NHS staff. Continuous professional development, lifelong learning throughout a professional career, this is what medicine is about. It has to be a priority and protected accordingly.'
>
> Policy Lead (Medicine) (1): Interview 2004

In exceeding £100 million per annum this represented a key resource for potential reallocation to other staff groups. Their vested interests therefore sought to shape the strategy's content and ensure minimal change. Consequently, across the policy leads, perceived opportunity costs, degrees of interpretive freedom and ensuing strategic directional guidance were polarised, giving rise to internally focused competition.

First-order emergents*: *The NHS managers

In contrast, the involuntaristic placement of the NHS managers fostered a more clearly defined strategic stance. This group sought to leverage their vested interests by shaping the scope of the strategy, focusing it to address an employer-led, as opposed to a healthcare professional-led, workforce and organizational development agenda.

> 'I need to reconfigure my organization, change the interface with the Local Health Boards on my patch. All of this demands a realignment of roles, professional groups. So, I need this strategy to lever that degree of change.'
>
> Inner Elite, NHS Manager: Informal discussion with principal strategist 2004

They therefore asserted their will through normative and cultural means to control the unfolding agenda of the project board and address perceived barriers to the strategy's development.

First-order emergents*: *The inner elite

The three inner elites—the chair of the board within the administrative core, a policy lead, and an NHS manager—each operated at the pinnacle of their respective

professional hierarchy, and formed a discrete cabal within the strategic arena. Indeed, drawing upon the wider literature of elite power beyond that informed by critical realism, these social actors, the '*Teflon Dons*'[1] of the Welsh Government's boards, task-and-finish groups, and policy networks—'the little group which makes a practice of attending meetings' (Michels, 1915, p.51)—regularly circulated through the nodal points of power, privileging their putative strategic agency to buffer against the 'rivalries and contestations' of others committed to their own protracted power games (Courpasson & Clegg, 2006, p. 320). As such, each was central to the orchestration of power across their individual networks, and so drew into play longstanding interpersonal relationships of trust, reciprocity, and mutual interest to maintain the unity of this social formation (Joseph, 2003). Their vested interests were therefore focused toward ensuring the maintenance of the boundaries of their elite power within the strategic arena.

The involuntaristic placement of the inner elite in the administrative core impacted upon the others. In a critical act of corporate agency—a mobilisation of bias that emerged as the 'power to choose' (Lukes, 1974)—the inner elite in the administrative core controlled the construction of the strategy's board: (i) from within their personal networks of allied inner elites, so fostering a hegemonic bloc that operated in adherence to Ministerial orders; (ii) from other players known to concede

[1] An insider's colloquialism that draws upon the language and symbolism of Francis Ford Coppola's film '*The Godfather*', and the metaphorical coating of political polytetrafluoroethylene that envelops such players.

legitimacy to those better positioned within this bureaucratic and hierarchically structured social space; and also (iii) from the principal strategist's personal networks. In so doing, a foothold was established upon the complex power dynamics between the other agents on the board that off-set the opportunity costs of engagement in such strategic episodes. Importantly, as expanded upon below, the constitution of this hegemonic bloc, formed from their shifting tripartite network of alliances which embraced and burdened all, lay at the heart of the board's strategizing.

Second-order emergents*: *Discordant situational logics

The structural and cultural emergent properties catalysed by the Kennedy Report impacted differently upon the four groups of agents, and was amplified by their respective social position, role-based, and institutional stance toward the development of the strategy (Archer, 2000b). First, the agents were not equal with regard to their social position and role-based power. For the three inner elites, given the bureaucratic hierarchical corporatism that enveloped the board and their dominance in role relationships with the policy leads or NHS managers, their 'negotiating strength', primarily exerted through political sanction, organizational resource control and expertise, overrode that of the others (Archer, 1995, p. 297). This functioned as a constraining influence between the other vested interest groups, confronting them with situational benefits or penalties of subtle subordination which, again, modulated their relationships vis-à-vis each other.

As illustrated in Table 2, different second-order emergents manifested for each group of agents giving rise to different situational logics. First, the inner elite in the administrative core, to buttress their strategic position and negotiating strength, enacted a self-referential situational logic of protection. At the level of agential interaction, their corporate agency and reflexivity was expressed through the situational reproduction of the inner elite cabal, so building a sense of solidarity within the board and structural hegemony across the relational array represented by the Welsh Government's policy and NHS Wales' organizational arenas. This manoeuvre, characteristic of a strong central bureaucracy where the vested interests of those in power seek to maintain the status quo, therefore created a strategic arena that was inherently morphostatic.

In the administrative core, given the asymmetric role dynamic between the inner elite and the others in this group, a situational logic of correction/compromise arose that adhered to the view that the strategic arena offered only limited scope for change. The administrative core therefore sought to assuage the tensions between opposing factions represented by the policy leads for medicine (and other health care clinical professionals) and NHS managers through a cautious balancing act that fostered a strong sense of unification at the socio-cultural level. Accordingly, the strategic agency of the administrative core offered only subtle potential for change.

However, the two other groups manifested countervailing situational logics. A coalition formed by medical and other healthcare clinical professionals operated a

consistent situational logic of elimination towards those aspects of the emergent strategy that challenged their privileged access to funding for postgraduate professional development. In seeking to maintain the entrenched systematisation and integration of professional jurisdictions across NHS Wales, their social interaction and ensuing strategic agency centred on professional expertise to leverage their position under the hegemonic dominance of the inner elites. In contrast, the NHS managers, in leveraging organizational resource control and corporate managerial expertise under a situational logic of opportunism, actively sought to foster an employer-led workforce development agenda that facilitated role flexibility and change at the structural and cultural system level via specialisation and differentiation within the Welsh NHS. These countervailing situational logics therefore held the potential to catalyse morphogenesis in the strategic arena.

Socio-cultural interaction (T^2-T^3)

To further illuminate how strategy and strategizing are shaped by the interplay of structure and agency, two specific aspects are now discussed. The first centres on the corporate agency of the three inner elites as a cabal, and exemplifies the discursive practice of political sanction through which the *Teflon Dons* exerted power induced compliance over opposing factions within the board. However, the second addresses the secondary tactic of reciprocal exchange and the ensuing harmonisation of desires that was adopted by the administrative core and disaffected policy leads due to fracturing of

the inner elite cabal as the structural reconfiguration of the Welsh NHS impacted upon the strategic arena, so destabilizing the power dynamics in play.

Power induced compliance

The inner elite, as a cabal, occupied a distinctive role-set and projected a defined and cohesive social identity. Within the confines of the board, and beyond, these players were dominant. Collectively, they therefore possessed a degree of raw bargaining power and negotiating strength that could subdue discordant voices. Their power was wielded to manifest effect, and whilst strategizing both overt domination and covert mobilisation of bias were in play (Lukes, 1974). The coalition formed by medical and other health care clinical professionals, fearing the loss of their privileged position, expressed their respective professions' intractable vested interests within boardroom exchanges. However, the inner elite in the administrative core curtailed this debate through the use of the social position and role-based power, political and policy expertise, and the subliminal threat of Ministerial sanction. This rebuke provoked the rapid agreement of another within the cabal and thus, under their collective situational logic of protection, reinforced their hegemonic dominance.

> 'The [Welsh Government] have indicated the need for this strategy—it's explicit in the response to Kennedy Report—and, given the delay in commissioning this work, this needs to be delivered as a matter of some urgency. This strategy has to be developed in alignment to current policy. It

will also need to reflect the regulatory frameworks for various professional groups, take into account Agenda for Change and the Knowledge and Skills Framework, and tie into NHS Wales' Balanced Scorecard. So, we have a lot to deliver.'

Inner Elite, Administrative Core: Project Board Meeting (3) 2003

'We can't just carry on as before—politically, professionally, publically—we've got to change, and not simply the funding for postgraduate education but the role and remit of medical, and other staff, in the service.'

Inner Elite, Policy Lead: Project Board Meeting (3) 2003

However this conflict—the potential loss of a culturally entrenched professional privilege—crystallized opposition. Across successive board meetings the inner elite in the administrative core, as chair of the board, exerted influence to orchestrate events, manipulating the particularised membership ties that connected the other inner elite players across the bureaucratic hierarchy to augment their stance. The other inner elites, in turn, used their internal and necessary structural relationships across their respective professional groups to subdue potential resistance in a manner that stymied the latent conflict. This strategic practice disciplined the board, corralling divergent vested interests in accordance with the asymmetrical powers, potentials, and liabilities of each board level actor. Therefore, in this contested strategic arena fraught with bureaucratic, hierarchical

and professional authority—and the cynical calculation and instrumental manipulation of politics—who was enabled to manifest their situational logic and act to monopolise events to meet their concrete hegemonic project was shaped by social position and inequality with respect to role-based power relations (Joseph, 2003; Potter, 2010).

Reciprocal exchange and the harmonisation of desires

As the formation of the strategy progressed, the structural reconfiguration of the Welsh NHS impacted upon the strategic arena. For the inner elite in the administrative core, other more pressing objectives now interceded, gained political prominence, and were pushed to the front of the delivery agenda by their political strategic champions. Moreover, for the NHS managers, organizational merger, role displacement or redundancy impacted, diminishing their collective potential bargaining power and negotiating strength, so dissipating the impetus for the change that they had sought. This legitimate 'desertion' (Archer, 1996, p. 198) placed the administrative core and disaffected policy leads into a strategic stalemate. Therefore, a more nuanced negotiation across the diverse vested interests groups ensued during informal meetings and opportunistic ad hoc encounters, each far removed from the oversight, censure and constraints of the formal boardroom debates.

The administrative core, guided by their situational logic of correction/compromise and the view that strategic arena offered only limited scope for

change, thus sought to focus the strategy toward the delivery of structural change. As a seemingly ever present state of affairs in the devolved NHS, this fostered less resistance from the disaffected policy leads' coalition, and was perceived by them to be a necessary prior step toward the longer-term strategic goal of cultural change.

> 'I am concerned about this, I won't deny it: I don't want to see postgraduate medical education compromised because funds are diverted elsewhere. I'll only commit to the formation of a new body with strategic oversight of workforce planning for NHS Wales to focus on alignment to Agenda for Change, and then let's continue the debate on workforce planning, capacity and capability.'
>
> Policy Lead (Medicine) (1): Interview 2004

Coercive communicative practices thus gave way to reciprocal exchange and a strategic path that would focus upon the centralisation of workforce supply and demand planning to facilitate the evolution of new roles and their associated education pathways, thereby postponing the cultural encroachment upon the traditional healthcare professions' privileged access to funding. Though drawn from the SAP field, as opposed to critical realist informed studies, this harmonization of desires depicts the practice of 'strategic ambiguity'—deferral, delay and indecision—fostered by the diffuse power and divergent vested interest of each group (Denis, Dompierre, Langley, & Rouleau, 2011, p. 225).

Structural reproduction or elaboration (T^3-T^4)

In the final phase of the morphogenetic cycle, the objective is to set out the tendential conditions under which morphogenesis or morphostasis arises from socio-cultural interaction, as conditioned by the prior social context, and thus account for the actual configuration of social elaboration. Hence, it must be acknowledged that Wales, as a polity, is small and cohesive due to the political ideological cohesion of its centre-left political parties (Drakeford, 2006). Furthermore, the Welsh NHS is deeply entrenched and ideologically beholden to the '*true NHS*' forged at the inception of this institution by Aneurin Bevan, a Welsh politician, and its central Ministerial architect (Chaney & Drakeford, 2004, p. 125; Welsh Labour Party, 2005). An internal, necessary, compatible and strongly institutionalized relationship thus exists between the Welsh Government and the Welsh NHS.

Consequently, the strategic arena examined in this paper was characterised by high levels of social and systemic integration. Indeed, with regard to health policy and strategy in Wales, the dominant macro level cultural emergent property in the strategic arena was the protection and maintenance of the ideological 'purity' of the NHS. Furthermore, given that political ideology and its embedded institutions function as vectors for structural conditioning, the dominant macro level structural emergent property operated hand-in-glove as centralised governmental statist control. Thus, with regard to health policy and strategy, invoking one political party's centre-left

ideological ethos also evoked that of others, so buttressing adherence to this stance to engender a self referential causal consensus that contorts the strategic arena giving rise to little more than 'cultural embroidery' (Archer, 1996, p.158).

Therefore, although the strategy was shaped through the enactment of a situational logic of correction/compromise, its scope, from the outset, was delimited by: (i) hegemony that fostered cultural morphostasis; and (ii) the monolithic form of social organization, with its superimposition of elites and concentration of resources, that generated an internal crystallization of opposition that dissipated through negotiation and exchange to deliver incremental structural change in the form of a fragile morphostasis. The strategic arena was therefore hemmed in by a strong central bureaucracy, and the vested interests of those in power who acted to maintain the status quo, so that the strategist confronted an arena that was irrefutably morphostatic. Thus, once formed and implemented, the strategy catalysed little more than a reorganization of the 'parts' and the 'people'.

Discussion and conclusion

The Archerian approach illustrated in this paper offers SAP ontological flexibility and a methodology based on analytical dualism that facilitates the examination of the interplay between structure and agency in the practice of strategy. This defined role is acknowledged to possess the potential to enrich our understanding of strategizing within a strategic arena shaped by 'structural obduracy, hierarchical powers and interests'

(Whittington, 2010, p.115). While such an approach is particularly apt for studies of bureaucratic public administration, it is merely one amidst a spectrum of other realist stances that may further inform SAP. Though explicitly refuted by Archer (2010b), the work of Bourdieu and Archer may be bridged by Fleetwood's (2008) empirical combination, Adams' (2006) hybridization, and Elder-Vass' (2007) ontological and theoretical reconciliation. Similarly, Stones (2005) builds upon the work of Giddens by adding Archer's, and others', critical realist informed insights to set out a strong variant of structuration theory. Therefore, though realism is, to date, a neglected theme in SAP it presents the field with new opportunities for looping together macro extra-organizational societal forces with micro intra-organizational strategic managerial activities in strategizing.

In exploring how structural and cultural emergent properties condition the context of action, an Archerian approach directs attention to: (i) internal and necessary relationships, which entail material resources whether physical or human, which generate causal powers proper to the relation itself; and (ii) the pre-existence, autonomy and durability of symbolic constructions and associated material practices which constitute the cultural system (Archer, 1995, p. 175-177). This 'resource' and 'schema' distinction resonates with sociological institutionalism, enabling SAP to connect to the strategy research agenda informed by institutional theory (Clemens & Cook, 1999, p. 443). Importantly, it reflects the perception of institutional logics as multiple, nested and

contested, and helps to reveal the causal mechanism that generates the 'situational logic' that results in the reproduction or transformation of the institutional field and strategies therein (Friedland & Alford, 1991). In this regard, it offers a methodological accompaniment to the current debate on institutional complexity (Greenwood et al., 2010). Furthermore, its emphasis on context, spanning the external environment, inter-organizational field, and intra-organizational infrastructure enhances its applicability for the broader strategic management research agenda, whilst the overt temporal and processual aspects lend themselves to strategy process research (Joseph & Ocasio, 2012). As a sophisticated variant of critical realism, an Archerian approach may even offer strategy research the means to test its theoretical foundations (Miller & Tsang, 2010).

In addition, Archer's progressive refinement of the mediation of structure to agency, conveyed through the interplay of social context and personal concerns in the internal conversation, may help to expose how strategists use their subjective and reflexive mental powers to formulate their strategic projects, individually and collectively. For in revealing that which 'we conclude internally (and always fallibly) will enable us to do (and be) what we care about most in society', this approach offers SAP, and the parent strategy field, insight into practice selection and use shaped by industry context, managerial cognition, and emergent strategic action (Archer, 2003, p. 133; Nadkarni & Barr, 2008). Thus, perhaps the most pertinent contribution of such a

penetrating critical realist lens is its potential to contextualise strategists' actions by helping to reveal the depths of institutional, organizational and individual complexity, so fostering insightful circumspection and further investigation into the elusive 'why' inherent to conscious, tactical, strategizing.

In this regard, Archer has identified four modes of agential reflexivity—communicative, autonomous, meta and fractured—which are contextually dependent and inform distinctive stances toward society (Archer, 2012). Communicative reflexivity arises in situations of contextual continuity and is associated with a situational logic of protection or correction that fosters morphostasis. Autonomous reflexivity arises in situations of contextual discontinuity and is associated with a situational logic of competition that drives instrumental rationality to generate a brittle morphostasis open to transformation. Meta-reflexivity arises in situations of contextual incongruity and is associated with a situational logic of opportunity fostering morphogenesis. In contrast, fractured reflexives, as the name suggests, fail to attain reflexivity as their powers are suspended by the onslaught of contingencies which render them merely passive agents (Archer, 2003). Archer's taxonomy therefore connects SAP to, and further informs, the wide array of strategy research on managerial sensemaking and cognition (Kaplan, 2011), and offers scope for comparison across national boundaries (Porpora & Shumar, 2010; Smith, 2010).

Yet limitations must be acknowledged. Archer (2000a, p. 162) posits that the three orders of reality—'natural, practical, and social'—give rise to distinct and heterogeneous forms of knowledge, which, in turn, entail a different balance of habituation and reflexivity. Reflexivity is minimal in the natural order, moderate in the practical order, and maximal in the social order (Archer, 2010b). Therefore, an Archerian approach is somewhat insensitive to strategists' non-reflexive socialisation. Indeed, it is focused upon strategists' 'practical evaluative' acts of conscious, intentional, strategic creativity, as they manoeuvre by hypothesising and making practical and normative judgements among possible trajectories of action in response to the demands of an evolving situation (Emirbayer & Mische, 1998, p. 970). As commented by Clarke (2008), Archer's approach is thus unable to address irrationality and inconsistent action. As such, it underestimates an agent's potential to live 'contradictory lives' in which not all practices are consistent steps toward achieving one's strategic goal (Luckett, 2008, p. 304).

Importantly, an Archerian approach reveals the nuances of power in SAP, highlighting the fracture between what strategists are free to envision and that which they ultimately bring to fruition when confronted by the constraints of the extant social structure. Thus, for the strategy researcher, it illuminates the elite with the power to dominate the debate, set the strategic agenda, and covertly manipulate the playing of this intriguing game (Lukes, 1974). Moreover, it reveals how others, differently

positioned within the field, respond to such constraints or enablements by perceiving the latitude in the margins and flexing the boundaries of their strategic discretion through the improvised in situ coping of their reflexive deliberation (Chia, 2004). Therefore, this view of agency acknowledges that a strategist cannot sculpt social reality at will (Campbell, 2009).

For Archer, primary agency is moulded by corporate agency. And, in SAP this notion is pivotal, if strategy truly is the 'manifestation of the managerial claim to power' and, in turn, the 'motor of field dynamics' and quintessential 'logic' in play (Archer, 1995, p. 179; Friedland, 2009, p. 888; McCabe, 2010, p. 172; Santos & Eisenhardt, 2009, p. 666). Consequently, through this approach, the interplay of structure and agency is sensitised to the emergence of the contested hegemonic control that fosters advocacy for, and resistance to, strategic change, so providing the requisite insight into strategic direction and ensuing outcome (Joseph, 2000).

Operationalizing an Archerian approach to the practice of strategy

To produce the 'transitive corrigible narrative' that is the 'methodological hall mark of morphogenetic realism' is, undeniably, time consuming and complicated (Archer, 1995, p. 294). Yet the most significant challenge is the abstraction and retroduction inherent to the data analysis. Abstraction draws out the various components within the strategic arena, facilitating the conceptualization of their interplay, through combination and interaction, so that the researcher may gain new insight (Sayer, 2000). Retroduction

builds upon this analytical stage, to reconstruct the basic conditions for such phenomena to be what they are, so fostering knowledge of the transfactual conditions, structures and mechanisms in play (Danermark et al., 1997). [See Danermark et al., (1997), Fleetwood & Ackroyd, (2004), and Sayer (2000) for an introduction to abstraction and retroduction in critical realism].

In essence, the goal is to posit a mechanism (typically at a different level of the phenomenon being explained), which, if it existed and acted in the postulated manner, could account for the phenomenon singled out for explanation (Reed, 2005). However, such analysis is open to individual interpretation, being performed under a logic of analogy and metaphor that is steeped in the investigator's perspective, beliefs, and experience (Lawson, 1997). Thus, an explanatory structure is devised through a combination of theory and experimental observation (Pawson & Tilley, 1997). But to be adequate this approach must abstract from particular conditions, excluding those which are believed to have no significant effect, in order to focus on those which do, and identify relations of different types: 'substantial', 'formal', 'external or contingent' and 'internal or necessary' (Sayer, 2000). As reflected by Archer, once this step has been achieved, it may be possible to combine or synthesise the various separate understandings into a unity that reconstitutes, or provides a better understanding of, the concrete (Archer et al., 1998, p. 170). In this empirical case study, this process was aided by the hierarchical bureaucratization of the strategic arena, which readily exposed

the internal and necessary relationships underpinning structural and cultural emergent properties.

A further issue with an Archerian approach, and with critical realism more broadly, is its lack of a theoretical depth in regard to social integration (Archer, 2010c). For Layder (2006), this is expressed by Archer's downgrading of the theoretical and empirical importance of interpersonal encounters, provoking his assertion that the domain of situated activity has been rendered too mute, thereby obscuring the emergent properties catalysed by social interaction. Similar discord is stressed by Mouzelis (2008), who argues that Archer has focused her consideration of agency upon the internal conversation to such an extent that intra-action is theorised at the expense of the interaction. Therefore, although Archer parallels Bourdieu's (field, agential position, capital) and Giddens' (signification, domination, legitimation) with a nuanced approach to power, the more subtle aspects of the relational structure that bind discrete strategic agents demand careful consideration.

In addition, though not wishing to disparage the skilled work of SAP researchers undertaking an ethnographic approach, the depth of *embeddedness*—in terms of a strategy practitioner's organizational access, personal networks, and contextual understanding of their field—that is required for an Archerian approach is potentially problematic. In undertaking this approach, appreciating the act of intellectual arbitrage in play, my then role as the principal strategist tasked to develop the focal strategy was

pivotal (Van de Ven & Johnson, 2006). Yet for SAP academics, irrespective of how well informed and intermittently immersed within a strategic episode, they routinely remain an 'outsider' (Ezzamel & Willmott, 2004, p. 45): part participant, part voyeur, forever lacking this essential element of 'withness' (Shotter, 2006, p. 585). [See Jarzabkowski and Seidl (2008), and Hoon (2007) for notable exceptions.] However, this issue is not confined to an Archerian approach. Indeed, the need for SAP to engage with strategists as research partners, not merely participants, has been recognised since the inception of the field (Balogun, Huff, & Johnson, 2003).

To conclude, this paper contributes to the theoretical and methodological enrichment of SAP by introducing and illustrating an Archerian approach to the practice of strategy. By maintaining the ontic differentiation between structure and agency this approach renders the conditions of action analytically separable from the action itself, thereby facilitating the analysis of their interplay, one upon the other, at variance through time, in strategy formation and strategizing. In this manner, insight into the discrete actions of strategic agents is revealed, offering SAP an analytical grasp upon the constraints and enablements which foster change—social and strategic—or the maintenance of the status quo. An Archerian approach therefore represents a useful addition to the more traditional approaches to SAP, and offers the field the means of exploring the increasingly complex empirical implications of some practice theoretical claims.

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Note

The author would like to thank Mike Reed, Rick Delbridge, Martin Kitchener, Robyn Thomas, Hugh Willmott, Tim Edwards, Joe O'Mahoney, Stephen Ackroyd and Alistair Mutch, as well the Senior Editor, David Seidl, and the three anonymous reviewers for their helpful comments on earlier drafts of this paper.

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Table 1: Case study information and data sources

Case site:	Welsh Government, NHS Wales and its public sector partner agencies.
Period:	2003-2007.
Data source (1):	***Strategy formation meetings*** Active participation in and transcription of: (i) 6 formal strategy formation board meetings; (ii) 4 informal meetings with board's chair.
Data source (2):	***Strategy formation semi-structured interviews and informal conversations*** (i) 75 semi-structured interviews on strategy formation; (ii) 50 semi-structured interviews centred on strategizing within the Welsh Government, NHS Wales and its public sector partner agencies. (iii) 23 impromptu discussions with agents across case site.
Data source (3):	***Strategy implementation*** Active participation in and transcription of: (i) 2 formal board meetings to observe the implementation of the strategy across an inter-organizational network comprised of one NHS Trust, its three Local Health Boards, and co-terminous Local Government organizations. (ii) Direct participant-observation of a two-day focus group of eighty stakeholders drawn from this inter-organizational network.
Data source (4):	***Supplemental documentary information*** UK and Welsh health and social care policy and strategy documents.
Central Actors:	***Welsh Government Strategy Board*** Board members comprised five categorical groupings, four of which are addressed in the paper: (i) the 'administrative core', senior civil servants with direct managerial responsibility for the development of the strategy; (ii) the 'policy leads', senior civil servants who were drawn from an array of professional orientations to guide the strategy's formulation; (iii) the 'NHS managers', chief executive officers from NHS Wales' then Trusts and Local Health Boards; (iv) the 'partner organizations' chief executive officers, or their academic equivalents, from NHS Wales' public service partner agencies [not included in empirical data presented]; and (v) the 'inner elite', composed of the chair of the board within the administrative core, one policy lead (healthcare), and one NHS manager (an NHS Trust chief executive officer).
Peripheral Actors:	***NHS Wales and partner agencies*** (i) Cross-section of NHS staff (chief executive to front-line roles); (ii) Chief executive or director level with partner organizations.

Table 2: An Archerian approach: Signposting how the empirical material relates to phases T^1-T^2, T^2-T^3 and T^3-T^4

Administrative Core	Policy Leads	NHS Managers	Inner Elites
Structural conditioning **(T^1-T^2):** *Identify the structural and cultural features which characterize the strategic arena, and determine how these condition socio-cultural interaction across the different vested interest groups in accordance with their social position, role, and institutional norms*			
First-order emergents			
Limited scope for change best served through brokering a path of compromise	Perceived opportunity costs, degrees of interpretive freedom and ensuing strategic directional guidance polarized, giving rise to internally focused competition	Development of the strategy into an employer-led, as opposed to a healthcare professional-led, workforce and organizational development agenda	Development and delivery of the strategy in alignment with the Welsh Government's centrist and bureaucratic set of values and beliefs
Second-order emergents			
Situational logic of correction/compromise	Situational logic of elimination	Situational logic of opportunism	Situational logic of protection
Socio-cultural interaction **(T^2-T^3):** *Identify the forms of strategic negotiation and exchange which characterize the strategic arena, focused upon power induced compliance, reciprocal exchange, and the harmonization of desire, and determine how these shape the ensuing strategic direction*			
Strategic negotiation			
Enact harmonization of desires to broker compromise via structural change, maintaining ambiguity over cultural change	Enact reciprocal exchange to broker compromise	Enact desertion due to heightened structural constraints	Enact power induced compliance, informed by political sanction, organizational resource control and expertise, to control the debate
Structural reproduction or elaboration **(T^3-T^4):** *Identify the forms of structural and ideational differentiation, together with agential re-grouping, which give rise to structural, cultural and agential elaboration or reproduction*			
Third-order emergents			
Limited structural change, with deferred cultural change and agential reproduction	Limited structural change, with deferred cultural change and agential reproduction	Structural, cultural and agential elaboration due to reconfiguration of NHS Wales	Maintenance of structural, cultural and agential hegemony
The resultant strategy therefore fostered a fragile morphostasis—a reorganization of the 'parts' and the 'people'—across the Welsh NHS			

Figure 1: The Morphogenetic-Morphostatic Cycle