

**Organizational Path Dependence in the Light of Practices:  
An Empirical Investigation of Self-Reinforcing Mechanisms in the  
Logistics Industry**

Vom Fachbereich Wirtschaftswissenschaften  
der Rheinland-Pfälzischen Technischen Universität  
Kaiserslautern-Landau  
zur Verleihung des akademischen Grades  
Doctor rerum politicarum (Dr. rer. pol.)  
genehmigte

D i s s e r t a t i o n

vorgelegt von

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Tag der mündlichen Prüfung: 13.03.2026

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D 386  
(2026)

## **ABSTRACT**

Research on organizational path dependence often overlooks the self-reinforcing mechanisms at its core. This study examines how these mechanisms develop and persist by applying a practice-based perspective centered on everyday organizing. Drawing on a qualitative single-case study of a multinational logistics and storage company undergoing an organization wide transformation, the analysis identifies six recurring practices (inquiring, framing, mobilizing, innovating, structuring and deciding) that constitute the four mechanisms of learning, coordination, complementarity and adaptive expectations. These practices form specific constellations that give the self-reinforcing mechanisms a recognizable gestalt. As practice intensities and effects shift during the path development process, the mechanisms appear as practice-effects rooted in situated doings and sayings rather than autonomous forces. The study also identifies a dual feedback logic in which positive feedback stabilizes emerging patterns, while inquiry-based negative feedback propels the process forward and keeps the path adaptive; a form of distributed agency in which attention and energy travel across practices; the insight that stability and change are produced by the same practices; and an understanding of lock-in as a continuum of practice thickening and cognitive sedimentation. This research therefore advances a '*life lived forward perspective*' on path dependence that goes beyond ex-post explanations. It specifies the micro-foundations of self-reinforcement, offers a practice-based account of how organizational paths take shape over time, and provides actionable insights for managers on how to recognize, monitor and redirect self-reinforcing dynamics during strategic transformation.

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## **LIST OF ABBREVIATIONS**

BI	Blend Initiative
CMD	Capital Market Days
CS	Customer Success
LSC	Logistic and Storage Company
PCA	Path Constitution Analysis
SRM	Self-reinforcing mechanism(s)
TMT	Top Management Team

## I INTRODUCTION

Research on organizational path dependence has gained steadily increasing awareness while addressing the question of “*how organizations can lose their flexibility and become inert or even locked in?*” and has therefore become an influential lens for explaining why organizations persist in rigid patterns and may drift into states of reduced flexibility (Dobusch & Schüßler, 2013; Sydow et al., 2009, p. 689). Described as a persistence phenomenon, the concept outlines self-reinforcing dynamics at its core, thereby complementing and partially substituting agency- or institution-based approaches in explaining change-inhibiting forces and rigidified action patterns – alias a path (Sydow & Schreyögg, 2013; Sydow et al., 2009). These self-reinforcing dynamics gradually stabilize specific courses of action and narrow the space for alternatives (Sydow & Schreyögg, 2013; Sydow et al., 2009, 2020). In this sense, path dependence pinpoints the stickiness of certain behavioral patterns and their resulting persistence, which is why it has been described as the “*ugly twin of change*” (Kirchner, 2013, p. 35; Sydow et al., 2020).

The four foundational self-reinforcing mechanisms – learning, coordination, complementarity and adaptive expectations – have been conceptually identified as the heart of the process, as they take hold and pull the developing path forward by being fed with positive feedback that enhances perceived efficiency, reduces uncertainty and increases legitimacy (Sydow et al., 2009, 2020). Since the publication of Sydow and colleagues’ process model in 2009, the research field has expanded considerably across multiple directions, including conceptual clarification and distinctions from related constructs such as structural inertia, imprinting or escalating commitment (Berthod & Sydow, 2013; Schreyögg & Sydow, 2011; Sydow et al., 2020). Further developments include theorizing on how paths are constituted (Sydow, Windeler, Müller-Seitz & Lange, 2012), how

actors may deliberately create or deviate from paths despite structural constraints (Garud et al., 2010), how organizations can break or interrupt reinforcing dynamics (Fortwengel & Keller, 2020; Obschonka & Petermann, 2013; Petermann et al., 2019), and how emerging paths can be monitored and diagnosed before they become inefficient (Schreyögg, 2014). Across these contributions, a significant ontological shift has taken place: research has moved away from predominantly positivist and substantialist explanations toward more social, processual and constructivist understandings of path dependence (Garud et al., 2010; Kremser & Sydow, 2022; Stache & Sydow, 2023; Sydow et al., 2009, 2020). This shift has been strongly supported by the integration of a '*Giddensian frame*' using structuration theory, whose notion of the duality of structure provided a conceptual bridge between path dependence and the recursive interplay of agency and structure in organizational life (Giddens, 1984; Sydow et al., 2009). Based on this ontological shift, a growing body of work adopts a more practice-based lens, to enhance the understanding of how organizational paths are enacted, reproduced, and reshaped through everyday activity. For example, Kremser and Sydow (2022) offer a theoretical integration by linking path dependence with practice theory, showing how recurrent linkages between practices may give rise to reinforcing dynamics. Similarly, Sminia et al. (2024) illustrate empirically how practices constitute and release technological trajectories within a field, thereby revealing early signs of how path processes unfold through situated activity. In addition, Janvier et al. (2025) demonstrate how strategic renewal emerges through repeated organizing practices across hierarchical levels, highlighting the processual and collective nature of path-related change.

Yet this 'practice-sensitive turn' has not highlighted "*the unfolding of self-reinforcing mechanisms [...] nor have these dynamics yet been conceptualized*" (Schreyögg & Sydow, 2011, p. 329), despite the centrality of these mechanisms within organizational path dependence theory. This

shortcoming is particularly striking given that self-reinforcing dynamics are described as a “*maelstrom of doings and sayings that is increasingly difficult to control*” (Kremser & Sydow, 2022, p. 2), while empirical research still provides little insight into how these very doings and sayings constitute the four self-reinforcing mechanisms or what “*inherent logic they carry*” (Sydow et al., 2020, p. 722). Taken together, this reveals a clear conceptual and empirical gap: although self-reinforcing mechanisms form the core of organizational paths, we still lack understanding of how they develop, interact and sustain momentum within the flow of organizational practice.

A major reason for this gap lies in the empirical focus of prior studies. Much of the existing work reconstructs self-reinforcing dynamics ex-post, once the outcome of a path is already visible. This makes it difficult to understand how the underlying mechanisms actually emerge, take effect and interact ‘*in vivo*’ and ‘*in situ*’ (Kremser & Sydow, 2022). Looking back from the end result hides the specific ‘*gestalt*’ of these mechanisms and limits the ability to see the micro-processes through which self-reinforcement begins to build. Therefore, Kremser & Sydow (2022, p. 2) stress that organizational practice is “*life lived forward*” and cannot be captured adequately through backward-looking explanations or “*law-like mechanisms*” (Meyer, 2013, p. 17). At the same time, these dynamics are often “*not well understood by the actors involved*”, which further contributes to why practice-oriented studies often sideline self-reinforcement even though it is a common feature of organizational life (Kremser & Sydow, 2022, p. 2).

Gaining such insight is particularly valuable, as it allows understanding under which conditions a self-reinforcing process can be intentionally reproduced, monitored, and possibly redirected (Sydow et al., 2009; Sydow et al., 2020). Recent research on path breaking highlights that understanding how organizations regain scope for action requires insight into how mechanisms operate across levels and time horizons (Fortwengel & Keller,

2020; Janvier et al., 2025). This limited empirical grounding therefore restricts the understanding of how self-reinforcing mechanisms might be consciously influenced and manipulated – an issue repeatedly identified as crucial for advancing the field (Sydow et al., 2009; Sydow et al., 2020; Fortwengel & Keller, 2020). Based on this gap, we formulate the following explorative guiding research question:

**“How do self-reinforcing mechanisms develop and remain in force?”**

In order to research the proposed question adequately, a qualitative single-case study design with ethnographic elements was adopted. The empirical setting was a multinational logistics and storage company, anonymized as LSC, which was undergoing a major organizational transformation under a newly appointed CEO. This transformation context – especially the Blend Initiative (BI), which aimed to integrate the company’s previously siloed structures – offered a rare opportunity to observe the early formation of self-reinforcing mechanisms within day-to-day work.

Therefore, the fieldwork took place within their headquarters in Rotterdam (Netherlands) from September to December 2024. This allowed the capturing of meetings, interactions, and the daily work environment during the transformation program. This was complemented by twenty semi-structured interviews, more than fifty informal conversations with employees across hierarchical levels – from top management to operational units – as well as archival data.

For the data analysis process, the Gioia methodology combined with temporal bracketing allowed a systematic way to identify six recurring practices – Inquiring, Framing, Innovating, Mobilizing, Structuring, and Deciding – which formed the empirical foundation for tracing the unfolding of the four self-reinforcing mechanisms described within the organizational path dependence literature.

The self-reinforcing mechanisms unfolded through distinct practice bundles and logics, yet with clear direct and indirect overlaps. Learning, for instance, repeatedly emerged through cycles of framing, innovating, and

inquiring, while adaptive expectations followed sequences of mobilizing, framing, innovating (deciding / structuring), and inquiring. Coordination and complementarity developed through different, yet similarly patterned combinations of deciding, structuring, innovating, framing, and inquiring.

Furthermore, the self-reinforcing mechanisms unfolded in an iterative, cyclical rhythm that moved from more coarse-grained decision processes toward increasingly fine-grained orientations stabilizing emerging solutions and organizational patterns. Within this process, the individual practices varied in their intensity and effect, shaping the emerging path and the momentum of self-reinforcement in different ways.

Building on these empirical insights, five central contributions to the theory of organizational path dependence were derived. First, self-reinforcing mechanisms can be understood as practice-effects rather than autonomous forces: they originate in situated doings and sayings rather than in abstract mechanism logic. Their unfolding is tied to how specific practice constellations are enacted, repeated, and gradually thickened. Second, the empirical material reveals that reinforcement operates through a dual feedback logic: positive feedback stabilizes emerging patterns, while negative feedback – surfacing in the form of inquiries – moves the process forward. Therefore, reinforcement develops through the constant interplay of stabilizing moments and moments of constructive challenges, rather than through simple accumulation. Third, agency becomes visible as shifting organizational attention structured through varying practice intensities. Instead of interpreting agency as either dominant or constrained, the findings show how actors' attention and involvement oscillate across practices, thereby shaping the evolving path. Fourth, the study highlights that stability arises through transformation. Stabilizing tendencies emerge from the recursive performance of practices that simultaneously refine, adjust, and alter the developing path – meaning that stability and change stem from the same practical work. Fifth, the findings reconceptualize lock-in as a

continuum. Rather than a discrete state, lock-in appears as a gradual thickening of practice patterns, resource couplings, and cognitive sedimentation. This explains how organizations may develop strong stabilizing tendencies without necessarily closing off alternative courses of action.

The overview of the overall approach and structure of the dissertation is provided in Table 1.

Chapter II introduces the theoretical background. It first outlines the historical development of organizational path dependence (Chapter II.1) as well as its foundational assumptions (Chapter II.2). Subsequently, Chapter II.3 traces the shift toward a social-constructivist ontology and highlights praxeological developments within existing literature.

Chapter III presents the systematic approach chosen to answer the proposed research question. Chapter III.1 therefore encompasses the research design and sampling strategy before illuminating the research setting (LSC) in detail (Chapter III.2). This is followed by Chapter III.3 and Chapter III.4, which present the data collection and analysis process.

Chapter IV outlines the processed results, which first introduce the contextual factors and main drivers of LSC's transformation (Chapter IV.1) and its respective timeline (Chapter IV.2) in order to build the contextual and temporal scaffold for the embedded, observed self-reinforcing mechanisms in Chapter IV.3. These findings are subsequently discussed in Chapter V, where Chapter V.1 illustrates the intensity and effects of the identified practices, and Chapters V.2 and V.3 discuss the theoretical and managerial implications. The final Chapter VI concludes the central findings within VI.1, highlights the study's limitations (VI.2), and offers suggestions for future research (VI.3).

<b>Chapter I: Introduction</b>		
<b>Chapter II: Theoretical Background</b>		
II.1 Antecedents of Organizational Path Dependence	II.2 The Conceptual Specification of Organizational Path Dependence	
II. 3 Traces of a Social Constructivist Ontology within Organizational Path Dependence		
<b>Chapter III: Research Design and Methods</b>		
III.1 Research Design and Sampling Strategy	III.2 Research Setting	
III.3 Data Collection	III.4 Data Analysis	
<b>Chapter IV: Results</b>		
IV.1 Contextual Factors and Drivers of LSC's Transformation	IV.2 LSC's Transformation Timeline	
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V.1 The Intensity and Effects of Practices on the Development of Self-Reinforcing Mechanisms and Organizational Paths	V.2 Theoretical Implications	V.3 Managerial Implications
<b>Chapter VI: Conclusion</b>		
VI.1 Summary of the Findings	VI.2 Study Limitations	VI.3 Suggestions for Future Research

**Table 1** Outline of the dissertation (Own illustration)

## II THEORETICAL BACKGROUND

The following chapter reveals the theoretical background to this work and therefore introduces the concept of path dependence, which has been studied within organization and management research for the past four decades (Dobusch & Schüßler, 2013). In general, path dependence explains how organizations lose flexibility over time and sometimes remain stuck in inefficient behavior patterns. The focus here is less on fixed structures and more on the processes through which initially open decisions gradually become narrowed by self-reinforcing dynamics (Sydow et al., 2009). Thereby, the central question is how those dynamics develop and are maintained, and which conditions lead into the state of a potential inefficient lock-in. Therefore, path dependence is not merely a historicity concept – it is a specific constellation whereby self-reinforcement and persistence are limiting the scope of action.

While the classic assumptions of path research focused on an objectivist and deterministic view, modern approaches increasingly integrate the actors' capacity to act and thus move towards a more constructivist ontology (Stache & Sydow, 2023). Against this backdrop, this chapter builds a bridge to practice theory, which reveals processes of stabilization and change in everyday actions. By viewing path dependence as a phenomenon that unfolds in practice, it is possible to understand how self-reinforcing mechanisms actually arise, operate and get transformed. This also addresses the research gap of not only explaining self-reinforcement theoretically, but also capturing it as a lived, observable process.

## II.1 Antecedents of Organizational Path Dependence

Organizational path dependence emerged from critiques of neoclassical economics, which assumes rational actors make optimal decisions, find optimal solutions, and therefore predict the ability to adapt optimally to new circumstances. In reality, however, organizations are shaped by historical events and constrained choices, leading to outcomes that deviate from the predictions of neoclassical economics (Schreyögg et al., 2003; Sydow et al., 2009). It has become apparent that economic and organizational processes are not free from history, existing structures or institutionalized expectations – every decision leaves structural, cognitive or procedural traces, which in turn influence the subsequent decisions while increasingly narrowing the future scope of action. This perspective demonstrates that under conditions of non-ergodicity, even small or random events can have longstanding consequences potentially leading to inefficiencies and rigidities, where neoclassical theory would assume adaptability (Arthur, 1989; David, 1985; Katz & Shapiro, 1985; Wenzel et al., 2015, pp. 3–4). These early formulations are based on a positivist and objectivist ontology as anchored in evolutionary economics, where paths are understood as a natural sequence of events, orchestrated by external shocks and cumulative effects. Actors are seen here as carriers of structures shaped by history rather than creating entities (Schreyögg et al., 2003; Stache & Sydow, 2023; Sydow, 2021).

David's (1985) elaborations on the QWERTY-keyboard therefore offer a classic example of how a technology had become diffused as an inferior standard due to seemingly random historic events and persisted for over a century although technically superior alternatives existed. This persistence could only be explained by recognizing non-ergodic economic processes, where past contingencies continue to matter – and therefore not by rational optimization. Katz and Shapiro (1985) supplemented this argument by

introducing the concept of network externalities, showing that the utility of adopting a technology rises with the number of other adopters, thus creating self-reinforcing demand effects. Subsequently, Arthur (1989) provided a further foundation by demonstrating how small initial advantages can lead to lock-in through positive feedback. More precisely, his model of increasing returns showed that small random events in the early stages of technological competition can favor one option over another, leading to different possible outcomes and even a lock-in, where less efficient technologies dominate due to their cumulative diffusion.

This concept was then extended beyond technologies to institutions and politics by North (1990) and Pierson (2000). North (1990) showed that institutions develop through path-dependent mechanisms, with rules and norms exhibiting persistence through self-reinforcing feedback, while Pierson (2000) further emphasized that decisions at critical junctures can shape long-term institutional developments. Thus, this strand of historical institutionalism broadened the scope of path dependence by shifting it from markets to political and social systems as well. This prepared and built the foundation for applying path dependence to organizational contexts. Nevertheless, the ontological base remained objectivist: institutions continued to be understood as given structures that determine action. Together, these contributions laid the groundwork for a new economic theory of historically contingent processes that explicitly questioned the neoclassical assumption of efficiency, therefore being perceived as the classic path dependence approaches in management literature (Stache & Sydow, 2023, p. 355).

From the early 2000s onwards, path dependence became increasingly prevalent in organizational research as a means of explaining why organizations adhere to certain strategies and structures. Earlier concepts such as structural inertia (Hannan & Freeman, 1984) or organizational imprinting (Stinchcombe, 2000) also highlighted persistence or explained

stability, but they did not fully capture the specific dynamic of reproduction and reinforcement, as appositely done by organizational path dependence with its explanatory core of self-reinforcing dynamics (Schreyögg & Sydow, 2011). This provided the foundation for the influential process model developed by Sydow et al. (2009), which outlined three phases, each governed by different regimes, e. g., unpredictability and non-ergodicity in the early phases and inefficiency and inflexibility in the later stages. The initial phase, the preformation phase, is characterized by a broad scope of action, where organizations face a multitude of options and decisions remain reversible. These options begin to narrow as soon as one choice triggers positive feedback – often in the form of increasing returns – reaching a critical juncture, which initiates the second stage, the formation phase. During this critical phase, the reversibility of decisions diminishes, and the scope of action becomes increasingly constrained due to the emergence of self-reinforcing mechanisms, which mostly unfold ‘behind actor’s backs’ (Schreyögg & Sydow, 2011, p. 322). These mechanisms, which represent the heart of the entire process, take hold and pull the developing path forward by being nourished with positive feedback as they enable a more efficient organization, saving time, costs, and resources. They are described as learning, complementary, coordination, and adaptive expectations effects. The learning effect enhances efficiency through the repeated enactment of practices. The coordination effect fosters efficient interaction among actors by standardizing institutional frameworks and rules. Similarly, the complementarity mechanism emphasizes the synergies created by integrating practices, resources, and rules, which collectively enhance value and efficiency. Lastly, the adaptive expectations mechanism mitigates the risk of legitimacy loss and the stigma of being perceived as an outsider by encouraging actors to align their preferences with those of others (Berthod & Sydow, 2013; Sydow et al., 2009, 2020b). As a result, certain practices, activities, and decisions become increasingly repeated, structured and

refined, ultimately leading to *the third* phase, the lock-in phase. This stage carries the potential to flip a path from a virtuous into a vicious one – described as the rationality shift (Masuch, 1985; Sydow & Schreyögg, 2013a; Sydow et al., 2009, 2020b). Thus, the paradox of success turning into rigidity continues to be one of the most powerful insights of the theory.

This conceptual development was accompanied by an ontological shift: away from positivism and towards a processual understanding of organizational stability. Paths are not external constraints but are created and reproduced through the actions of ‘knowledgeable actors’ (Sydow et al., 2009). History is thus understood not as restrictive, but as constitutive for organization.

Subsequent research elaborated and further refined this understanding of the process. Sydow and Schreyögg (2010) stressed that the distinctiveness of path dependence lies in its processual logic and the dynamics of self-reinforcement and not in the statement that ‘history matters’. Schreyögg et al. (2003) had already applied the prior economic logics to organizations and thereby shown that paths are historically pre-structured and self-reinforcement can take on not only economic but cognitive, social and emotional forms. Consequently, lock-in rarely means complete standstill and determination but instead limited scope for action. This opened the discussion to the possibility of both path breaking (de-locking) and path creation.

Especially the idea of path creation, created by Garud and Karnøe (2001), shaped the discourse on organizational paths. The concept of intentional and mindfully deviating from existing patterns in order to initiate a new course reversed the logic of early models. Thus, structures do not determine action fully but are always (re-) produced in relational and collective practice. Their work therefore highlighted the existing creative side of agency. From this perspective, paths were also perceived as social configuration supported by reflexive agency and collective sensemaking (Garud et al.,

2010). Schreyögg et al. (2003) describing path creation as a social process that arises through resource mobilization, collective entrepreneurship and momentum. Paths are thus neither purely emergent nor exclusively intentional, but rather the result of recursive interactions between structure and agency. Based on this, the concept of path constitution was developed in order to connect the restrictive logic of path dependence with the generative perspective of path creation (Sydow, Windeler, Müller-Seitz, & Lange, 2012; Sydow, Windeler, Schubert, & Möllering, 2012) In this sense, paths are understood as being continuously constituted – through practices and material arrangements that reinforce themselves but remain reflexively changeable. This approach marks the transition from a causal-deterministic to a constructivist understanding of processes (Stache & Sydow, 2023).

Against this backdrop, methodological approaches such as Path Constitution Analysis (PCA) were developed to bridge theory and empirical inquiry by first clarifying the constitutive features of a path and, second, providing a framework to understand how paths are formed, reinforced, and stabilized in practice. Similarly, Wenzel et al. (2015) introduced Path Biography Methodology (PBM) to extend the analysis of path-dependent processes by tracing the biographical evolution of socio-technical systems. It aims to capture self-reinforcing mechanisms across technical and organizational levels, thereby providing a qualitative framework to understand how technological and social dynamics interact and mutually stabilize over time. However, PCA remains complex and has only rarely been applied systematically, despite its theoretical connectivity, which has limited its diffusion. In addition, more pragmatic instruments have been introduced to make self-reinforcing dynamics visible before they result in possibly inefficient situations of lock-in: Schreyögg (2014) proposed the notion of path monitoring – an observation and reflection system that aims to identify emerging lock-in tendencies.

With this, the academic discourse also included the concept of breaking paths, and the possibility of this being intentional or unintentional as well as exogenous or endogenous (Fortwengel & Keller, 2020; Sydow et al., 2009, 2020b). Furthermore, it was argued that under certain conditions, organizations can regain room for maneuver by deliberately interrupting or redirecting existing self-reinforcing processes. Path breaking is therefore not a spontaneous departure, but a conscious, often long-term process of disrupting and reversing reinforcement cycles.

Further research emphasized the coexistence of multiple paths. For example, Onufrey and Bergek (2015) have demonstrated how multiple technological development paths can coexist in parallel in multi-technology industries, reinforced by competition and complementarities. Another example was presented by Zientara and Müller-Seitz (2024) who examined how organizations can simultaneously pursue different organizational paths, such as agile and waterfall methods, leading to tensions but also to new opportunities for innovation. These studies shifted the focus from single dominant paths to more complex constellations of interacting development paths.

Despite all these refinements the conceptual ambiguity remained and critics continued. Based on the theoretical clarification by Vergne and Durand (2010), who differentiated between path dependency as a process and path dependence as an outcome (lock-in), as well as the need for self-reinforcing mechanisms, later work expanded the discussion to include an agency-related dimension. This resulted in the demarcation of a weak and a strong view of agency. This resulted in resulting demarcation of a weak and a strong view of agency. Fortwengel and Keller (2020), for example, stated that the strong view emphasizes the structural dominance of self-reinforcing mechanisms, while agency is primarily reproductive. In contrast, the weak view allows for reflexive intervention and intentional change within existing dynamics. Schreyögg and Sydow (2011) similarly emphasize that path

dependency cannot be reduced to the statement that ‘history matters’, but must be explained by concrete self-reinforcing mechanisms. Furthermore, Sydow et al. (2020) reinforce the strong, mechanism-based perspective and emphasize that path dependency does not merely describe continuity, but rather a recursive process logic of self-reinforcement, reaffirming the strong conception and stressing that path dependence is not a metaphor for persistence but a process driven by dynamic feedback loops.

Yet, while the central role of self-reinforcing mechanisms has been well established conceptually, their empirical analysis has often lagged behind. The dynamics through which these mechanisms operate in everyday organizational life remain only partially understood. That is why most recent research has turned toward practice-based perspectives that address precisely this gap. For example, Kremser and Sydow (2022) integrate path dependence – as an example of a self-reinforcing process – with practice theoretical approaches in order to overcome the ontological challenges within academic discourse. They argue that practices themselves can become path-dependent when recurring links between them generate positive feedback and are reproduced over time. Thus, path dependency does not lie above practice but unfolds within it. This shift allowed researchers to investigate path dependence not only in terms of structures or outcomes but as a process unfolding within everyday practices. It also opened possibilities for analyzing self-reinforcement “in vivo and in situ,” closer to organizational life as it is actually lived. Practical theoretical work thus translates the abstract logic of self-reinforcement into empirically observable contexts of action, in which repetition and variation intertwine. Building on this understanding, Sminia et al. (2024) apply a practice-based perspective to the emergence of the MP3 format, showing how existing paths within a field of practice can be loosened and new ones established. Using *path constitution* as an analytical framework, they examine the processes of *path release* and *path creation juncture*, illustrating how critical

junctures may not only initiate but also dissolve practices within ongoing trajectories. In doing so, they expand the understanding of path dependence from a theory of rigidity toward a broader framework for explaining how practices are stabilized, transformed, or reconfigured.

Taken together, the development of path dependence theory illustrates a gradual ontological shift – from positivist and processual foundations toward constructivist and, most recently, practice-based perspectives. Originating as a critique of neoclassical efficiency assumptions, it has evolved into a comprehensive framework for explaining why organizations persist in established trajectories, how these trajectories are reproduced through self-reinforcing mechanisms, and under what conditions transformation becomes possible. Methodological contributions such as Path Constitution Analysis (Sydow, Windeler, Müller-Seitz, & Lange, 2012), as well as concepts like *path break* and *path monitoring*, have enriched this understanding.

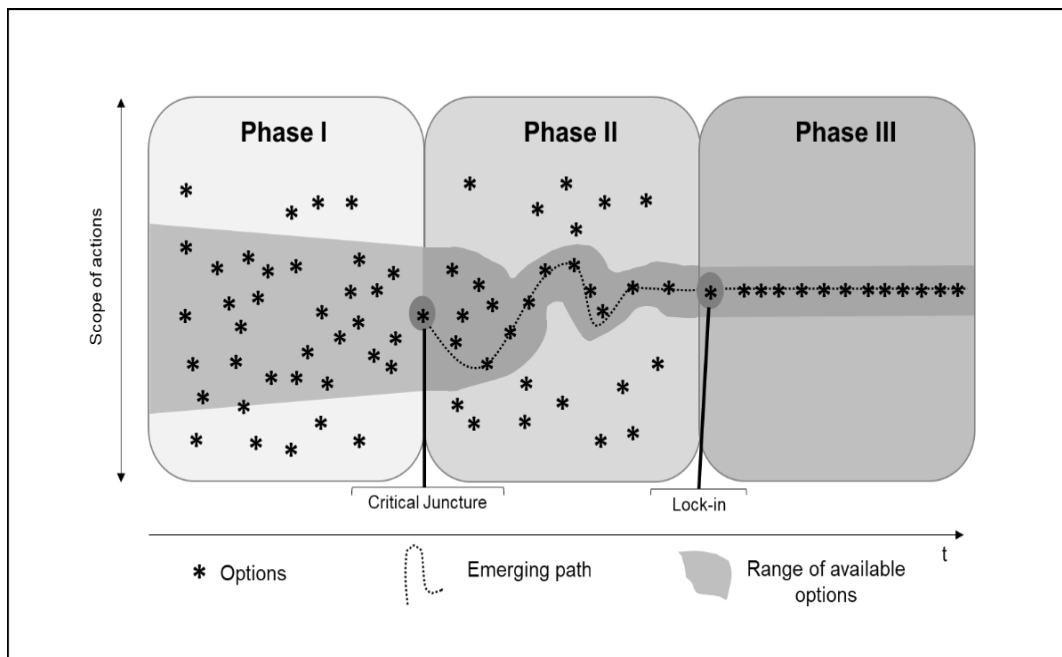
### **II.2 The Conceptual Specification of Organizational Path Dependence**

After describing the origins and development of organizational path dependence, this next chapter aims to specify conceptually its central definitions, the predominant three-phase model, the underlying assumptions, and its existing boundaries relevant for this present work. In recent years, the concept of path dependence has found widespread application across different research fields due to its interdisciplinary character “*rooting in evolutionary thought, complexity and chaos theory, social constructivism, economic theory and history, systems theory, and the social studies of technology*” (Sydow et al., 2020a, p. 3). In the field of management and organization research, many contributions refer to organizational path dependence in connection with rigidity, inflexibility, and

persistence due to “*imprinting effects of the past organizational behavior*” (Sydow et al., 2009, p. 689), using the term as a broad label or even as a synonym. This more metaphorical than theoretical use of path dependence has led to conceptual vagueness, calling for a more “*rigorous understanding*” and is still “*part of a nascent field of management and organization research*” (Koch, 2011, p. 337; Sydow et al., 2009, p. 689).

Against this backdrop, Sydow et al. (2009) stated that “*path dependence is first of all a process*” (p. 690), where ‘history matters’ in a sense that all human activities and organizational processes are imprinted by their history and have implications for future actions (“*bygones are rarely bygones*” (p. 690)). Yet, acknowledging history alone is not a theoretical explanation, as this would imply “*that all organisational decisions are path dependent*” (Sydow et al., 2009, p. 690, 2020b, p. 718). Instead, path dependence refers to a distinct type of organizational process, explaining the rigidification of organizational routines and strategies, describing an entrapping process driven by self-reinforcing mechanisms narrowing the scope of options resulting in lock-in (Schreyögg & Sydow, 2011, p. 323; Sydow et al., 2009, p. 690). In other words, it provides an explanation for how organizations become confined to a situation of limited choices and how change-inhibiting forces emerge. Consequently, it pinpoints the stickiness of certain organizational behavior patterns and therefore explains their resulting persistence, hence, being described as the “*ugly twin of change*” (Kirchner, 2013, p. 35; Sydow et al., 2020b).

This process (as shown in Figure 1), conceptualized by Sydow et al. (2009), is divided into three different phases each governed by different regimes, e.g., unpredictability and non-ergodicity in the early phases and inefficiency and inflexibility in the later stages.



**Figure 1** Organizational path dependence (adapted from Sydow et al., 2009, p. 692).

Nonpredictability describes the indeterminant outcome of the process in the beginning, while nonergodicity describes the fact that several outcomes are possible and history selects among them. Both decrease over time as decisions and actions start to form the course of action. Meanwhile, inflexibility and inefficiency increase over time as the flexibility to choose from different alternatives decreases and shifts to other options become impossible – causing potential issues if superior solutions are available (Sydow et al., 2009, p. 691).

The first phase of the path dependence process, the *preformation phase*, is characterized by a broad scope of action, where organizations face a multitude of options to choose from. At this stage, decisions remain reversible, and their long-term consequences cannot be predicted (Mahoney, 2000, p. 511). Yet, these options are not an unrestricted starting point, or infinite as proposed in technological path studies (Arthur, 1989, 1994; David, 1985); they are restricted and interlinked with other ongoing

developments such as prior routines, available resources, and institutional norms (depicted by the grey shadow in Figure 1). Consequently, path development and its future trajectory are not yet determined but remain embedded in and connected to earlier organizational structures and patterns, and mirror a situation of historically framed contingency. For example, when an organization introduces a new digital tool, its implementation is rarely detached from pre-existing communication routines and governance arrangements. Therefore, initial choices and actions are always situated within existing practices that shape them but do not determine them – *“history matters – but is not destiny”* (Sydow et al., 2009, p. 692).

These initial choices and events can trigger a series of subsequent actions, which possibly initiate self-reinforcing mechanisms marking the transition to the second phase (Schreyögg & Sydow, 2011, p. 323; Sydow et al., 2009, p. 693). Within literature they are either referred to as *“small events”* (Arthur, 1994, p. 14) or as *“critical juncture”* (Sydow et al., 2009, p. 691). They can be either random and small or strategically and intentionally motivated – as *“there is no logical or empirical necessity for the exclusive reliance on small/random events”* (Schreyögg & Sydow, 2011, p. 323). Therefore, the relevant point is not the size or the intent of the actions within the organizational context – it is relevant whether they trigger the self-reinforcing mechanisms or not (Schreyögg & Sydow, 2011; Sydow et al., 2009, 2020b). Regardless of the characteristics of the trigger, they *“can never be considered causal determinants”* (Sydow et al., 2009, p. 693), which again explains the nonlinear logic and contingent dynamic of path-dependence: initial choices can lead to unforeseeable outcomes, which do not follow a linear cause-and-effect scheme. Path dependence thus establishes itself as a contingent process and not as a deterministic explanatory model (Schreyögg & Sydow, 2011; Sydow et al., 2009, 2020b).

This contingent process transitions into its second phase – the formation phase – as soon as one of the initial choices triggers positive feedback, often in the form of increasing returns, setting self-reinforcing mechanisms into motion (Dobusch & Schüßler, 2013). This point marks the moment when a specific path starts to be formed and is referred to as critical juncture (Schreyögg & Sydow, 2011; Sydow et al., 2009, 2020b). During this critical phase, the reversibility of decisions diminishes, and the scope of action becomes increasingly constrained due to the emergence of self-reinforcing mechanisms, which mostly unfold ‘*behind actor’s backs*’ (Schreyögg & Sydow, 2011, p. 322; Sydow & Schreyögg, 2013b, p. 3). These self-reinforcing mechanisms, which represent the heart of the entire process, take hold and pull the developing path forward because they are fed by positive feedback (Dobusch & Schüßler, 2013), as they enable a more efficient organization, saving time, costs, and resources. Therefore, this phase is marked by a specific logic that “*takes the lead*”, favoring certain patterns of action and decisions in between competing options, which are reproduced over time due to receiving positive feedback (Sydow et al., 2009, p. 696). Important to note is that this process is – especially at its onset – still contingent and non-ergodic: the outcomes are not fixed but ‘path-shaped’ (Koch, 2011, p. 338; Sydow et al., 2009, p. 696). This means that while an alternative course of action exists, switching to a new course becomes increasingly constrained as positive feedback loops amplify the attractiveness and legitimacy of the dominant pattern (Koch, 2011, p. 338; Schreyögg & Sydow, 2011, p. 323).

Furthermore, Koch (2011, p. 338) describes this phase as “*path inscription*”, where the chosen path gets materially, organizationally and cognitively *inscribed* into structures, routines and resources. Thus, the formation phase reflects the institutional and material embedding of a strategic direction, whereby actions and interpretations become mutually reinforced. This inscription is – as already mentioned - driven by self-

reinforcing mechanisms. These are described as learning, complementary, coordination, and adaptive expectations effects, which explain how a structured, reproductive dynamic emerges from a contingent beginning (Fortwengel & Keller, 2020, p. 1171; Sydow et al., 2009, p. 696). They are dynamic, recursive processes that lead to the increasing probability that the same decisions or actions will be repeated through positive feedback, resulting in a rigidified action pattern, which reproduces itself and thereby diminishing other options (Koch, 2011, p. 342; Vergne & Durand, 2010; Wenzel, 2015, p. 269).

The adaptive expectations mechanism mitigates the risk of legitimacy loss and the stigma of being perceived as an outsider by encouraging actors to align their preferences with those of others (Berthod & Sydow, 2013; Sydow et al., 2009, p. 700). Rooted in social feedback loops, adaptive expectations effects unfold when actors adjust their choices according to what they believe others will prefer: the more actors assume that others favor a certain option, the more attractive this option becomes in turn, thereby amplifying its perceived legitimacy (Katz & Shapiro, 1985; Pierson, 2000, p. 254). This results in shared expectations that reinforce one another, and this in turn creates a self-fulfilling prophecy (Merton, 1948): collective beliefs about what is appropriate translate into behavior that confirms exactly those beliefs. Over time, this dynamic can evolve into a vicious cycle of conformity (Masuch, 1985), where deviating from collectively expected behavior increases the risk of legitimacy loss and further strengthens alignment pressures (Pierson, 2000; Sydow et al., 2009). In organizational contexts, this becomes visible when members adopt certain practices mainly because they expect others to do so as well – not necessarily because of personal conviction, but because they anticipate that this is what is expected socially. Driven by the need to belong and the desire to “be on the winning side” (Sydow et al., 2009, p. 700), actors increasingly align their behavior with collective expectations, which over time leads to a social lock-in sustained

by shared perceptions of appropriateness (Katz & Shapiro, 1985; Pierson, 2000; Schreyögg & Sydow, 2011, p. 325).

The coordination effect fosters efficient interaction among actors by standardizing institutional frameworks and rules. It represents the social or institutional counterpart to economies of scale, as the more actors adhere to the same rule, routine, or practice, the more efficient their interactions become. For example, standardized communication tools, or coordinated working hours ensure seamless cooperation but at the same time neglect potential alternatives (Fortwengel & Keller, 2020, p. 1172). Nonetheless, coordination effects bear several advantages by building rule-guided behavior: first, the reduction of interaction and communication costs, second, the eased anticipation of different actions by several actors, and third the decrease in misunderstandings. All result in an increase in efficiency and in parallel, following existing rules becomes more and more attractive, which in turn promotes their further propagation. Therefore, the coordination value per actor increases (Pierson, 2000, p. 254; Schreyögg & Sydow, 2011, p. 324; Sydow et al., 2009, p. 699).

The learning effect describes how repeating the same action or practice leads to adopting new capabilities and improving them over time. Thereby, the action or practice gets performed faster and more accurately, which reduces the cost and increases its efficiency (Argote, 2013; Levinthal & March, 1993). Each repetition strengthens routines and improves coordination among actors, making established practices smoother and more reliable over time (Sydow & Schreyögg, 2011, p. 324). Because familiar practices become easier and more efficient, they are often seen as the safer and more legitimate option compared to exploring new alternatives. Therefore, improvements of existing routines are more likely to be accepted than efforts to search for new approaches and question old ones. As a result, organizations increasingly rely on what they already know, leading to being

“competently trapped” in their own expertise (Wenzel, 2015, p. 270), as the risk and costs of trying something else grows (Levinthal & March, 1993).

Lastly, the complementary mechanism emphasizes the synergies created by integrating practices, resources, and rules, which collectively enhance value and efficiency (Pierson, 2000). Similarly to the economies of scope, complementarity describes the joint use of two or more interrelated resources across activities, which create an additional surplus leading to increased efficiency and strategic advantages. This surplus is not merely additive but multiplicative, meaning that the connection of routines and practices produces a higher outcome than the sum of their individual contributions, making it even more attractive to exploit the synergies (Pierson, 2000; Sydow et al., 2009, p. 699). In the organizational context, these synergies can be built and exploited by linking processes, technologies, structures, culture and competences into one coherent system. This strengthens stability and efficiency but also builds interdependencies between the linked elements, creating “*deep structures*” (Leonard, 1995), which once established are difficult to reverse due to the high adjustment costs, as modifying one element requires adaptation of the other, connected elements. Consequently, the embedded pattern becomes increasingly difficult to change, the reversibility of decisions decreases, and the path becomes more rigid (Sydow et al., 2009, 2020b).

Throughout the formation phase, the described self-reinforcing mechanisms interact and conjointly narrow the scope of action by restricting alternatives due to the perceived efficiency, legitimacy, or expectations attached to certain decisions and practices. These mechanisms are dynamic and repetitive in nature; they continuously reproduce the same patterns of decisions and actions, thereby stabilizing what has already been established (Koch, 2011, p. 342). In doing so, self-reinforcing mechanisms progressively shape and are shaped by specific organizational routines and resources. Over time, the path begins to inscribe itself into the organization – and

depending on the degree and depth of this inscription, viable alternatives gradually fade (Koch, 2011, pp. 342–343; Wenzel, 2015, p. 269). As actors repeatedly enact established heuristics, they lose sight of other possible courses of action (Koch, 2011, p. 338; Sydow et al., 2009). This dynamic describes the abovementioned *entrapping process*, when actors become unintentionally caught in a self-stabilizing logic that is difficult to conceptualize and even harder to reverse (Sydow et al., 2009, p. 690). The longer this gradual process unfolds, the more irreversible the chosen path becomes, ultimately leading to the third phase – the lock-in phase.

In this phase, the dynamic self-reinforcing mechanisms densify into a “*kind of equilibrium state in which the turbulent path-building phase has ended in a lock-in*” (Sydow et al., 2020b, p. 727). In other words, a specific set of decision- or action patterns become predominant through repetition and positive reinforcement due to “*organizations reproducing one prevailing strategic pattern*” (Wenzel, 2015, p. 269). This phase therefore marks the transition from a more ‘spiraling logic’ to a ‘stabilized logic’ – while one should refer to a relative stability rather than a deterministic one (although there can be extreme forms, like those found with technological solutions like the QWERTY keyboard) (Sydow et al., 2009, p. 693). This means that organizations have a (strongly) narrowed scope of action and less alternatives, but it does not mean that there is complete rigidity (Sydow et al., 2009, 2020b). Yet, alternatives are still perceived as impractical, irrelevant or no longer feasible due to “*high switching costs, sunk costs or monopoly*” (Sydow et al., 2009, p. 694), which in turn leads actors to reproduce the same path and same outcome again, as it is not questioned any longer (Sydow et al., 2009, 2020b).

The lock-in itself can appear in different forms: cognitive, normative or resource based. Cognitive lock-ins are based on entrenched patterns of thinking and perception filters that block out alternative options; normative lock-ins arise from cultural and institutional expectations, and finally,

resource-based lock-ins are rooted in material or technological dependencies (Arthur, 1994; David, 1985; Koch, 2011; Leonard, 1995; North, 1990; Pierson, 2000; Sydow et al., 2009; Wenzel, 2015). They often overlap and contribute together to stabilizing a path by building an “*invisible deep structure*” – an underlying core pattern of organizational routines, which nevertheless allows for a certain degree of variation while being performed (Sydow et al., 2009, p. 695). Therefore Sydow et al. (2020, p. 727) emphasize that a lock-in is “*not a complete standstill*” and the path has to be continuously reproduced and enacted on a daily basis by “*knowledgeable agents*” (Giddens, 1984; Ortmann et al., 2023; Sydow et al., 2009, p. 695). They reproduce structures but also interpret and modify them. Sydow et al. (2009, p. 694) describe this as “*a predominant social influence, leaving some scope for variation.*” Koch (2011, p. 338) refers to this residual scope as a “*remaining range of variety*”.

Initially, the lock-in phase can enhance efficiency and strategic fit with the prevailing environment (Sydow et al., 2009, 2020b; Vergne & Durand, 2010) as “*they may be not problematic from the outset*” (Wenzel, 2015, p. 269). Yet, it carries the potential to flip a path from a virtuous into a vicious one – described as the rationality shift (Sydow et al., 2009, p. 695). . As the organizational or environmental context changes, formerly effective configurations may turn into rigidities that hinder adaptation and thereby cause potential inefficiencies. However, Sydow et al. (2009, p. 695) emphasize that “*calling a lock-in ‘inefficient’ always implies a base of reference.*” What appears rigid or dysfunctional from one perspective – such as within a specific unit – may simultaneously create stability and predictability from another. Consequently, lock-ins are not inherently positive or negative; rather, they reflect different degrees of structural persistence, which can stabilize organizational behavior in the short term, but bring the risk of inertia over time.

Sydow, Windeler, Müller-Seitz, and Lange (2012) describe several indicators in order to define the lock-in phase:

- (a) Actors assume that the current solution is the only viable option; alternatives are no longer seriously discussed;
- (b) Former competing options are perceived as outdated or merely niche solutions;
- (c) Financial and organizational resources continue to be allocated without being questioned or critically reflected on;
- (d) Interpersonal or interorganizational relationships that have become aligned to the path are automatically maintained;
- (e) Only one course of action is viewed as appropriate or legitimate (in an extreme case).

In sum, organizational path dependence describes a contingent yet self-reinforcing process through which historically imprinted actions evolve into increasingly stabilized patterns. While self-reinforcing mechanisms initially enhance efficiency and coherence within the formation phase, they gradually restrict alternatives and foster rigidity over time. Furthermore, they “*often unfold behind the backs of the actors and bring about an escalating situation with unexpected results*” (Schreyögg & Sydow, 2011, p. 322). The subsequent lock-in phase is therefore coined by stability and efficiency – as long as no rationality shift occurs – and is continuously reproduced by the very actors it constrains (Sydow et al., 2009, 2020b).

Although other concepts, like structural inertia, organizational imprinting, and escalating commitment also address historically entrenched rigid structures (Schreyögg & Sydow, 2011), “*it is only the theory of path dependence that explicitly explores and exposes the dynamics of self-reinforcing mechanisms*” (Schreyögg & Sydow, 2011, p. 322):

- (a) Structural inertia describes the necessity to routinize organizational activities, as this secures internal and external

reliability and accountability and explains stability as a result of external selection pressures (Hannan & Freeman, 1984). Path dependence, in contrast, arises from internal feedback mechanisms that focus on initial decisions that narrow the scope of action over time (Schreyögg & Sydow, 2011).

- (b) Organizational imprinting describes the causal relationship between the influence of initial decisions, whereby founders unconsciously use elements from their environment (cultural, political or economic), which are later reproduced over time and imprinted within the organizational structure long after the founding phase. It therefore treats persistence as a static condition, whereas path dependence explains how persistence emerges through recursive feedback rather than assuming it as given (Schreyögg & Sydow, 2011; Stinchcombe, 2000).
- (c) In a similar way, *escalating commitment* also describes self-reinforcing tendencies, but on the individual level. Managers, for example, may keep investing in a failing project because they want to justify earlier decisions or avoid admitting a mistake. Both concepts deal with situations of entrapment, but escalating commitment focuses on individual thinking and decision biases, whereas path dependence occurs on the organizational level – for instance, when established routines, decision rules, and resource allocations keep an organization following the same course of action, even though the original reason for doing so no longer exists (Schreyögg & Sydow, 2011; Staw, 1981).

Table 2 Provides an overview and details further distinctions.

	Structural inertia	Organizational imprinting	Escalating commitment	Organizational path dependence
<b>Core Mechanism</b>	External selection pressures favor stable structures	Founding conditions leave enduring marks on structures and routines	Cognitive biases lead to continued investment in prior decisions	Internal self-reinforcing mechanisms amplify early decisions, narrowing alternatives
<b>Level of analysis</b>	Organization, sometimes population	Organization	Organization	Organization, applicable to other levels as well
<b>Temporal logic</b>	Static; stability is maintained through environmental selection	Static; persistence until disrupted by external change	Episodic; repeated justification of failing actions	Dynamic; recursive feedback leads from contingency to lock-in
<b>Outcome of the process</b>	Persistence; efficient and alter inefficient	Persistence	Persistence and inefficiency	Path dependence, at least potential inefficiency

**Table 2** Distinctions between organizational path dependence and related concepts (adapted from Sydow & Schreyögg, 2011, p. 331).

With this distinction, Sydow et al. (2009, p. 696) defined a path as a *“rigidified, potentially inefficient action pattern built up by the unintended consequences of former decisions and positive feedback processes.”* The general idea is therefore that a path always includes a form of dependence that is built through self-reinforcing mechanisms, not just on repetition or recursiveness (Sydow et al., 2020b, p. 719).

Furthermore, within their Path Constitution Analysis (PCA) methodology Sydow, Windeler, Müller-Seitz, and Lange (2012) developed an ‘observation frame’, which allows recognition of how and if a path exists or develops in the first place. These constitutive features therefore seek further conceptual and empirical distinction and definition. They distinguish six different features (Sydow, Windeler, Müller-Seitz, & Lange, 2012, pp. 158–162):

**(a) Level of interrelatedness (i. e. contextual framework):**

Determines the analytical context and boundaries of a path: paths do not exist in isolation but are embedded in different levels (focal, upper and lower boundary levels). Those levels are reciprocal, and processes on upper levels (e.g. on institutional levels) or lower levels (e.g. individual levels) influence the development of the focal path.

**(b) Triggering event (i.e. starting point):** Depicts (as already mentioned) an event or decision that triggers the path process in a certain direction and is often only understood ex-post.

**(c) Non-ergodic process (i.e. directional progression):** Describes the structured, but open process logic of the path process – it is not random, but not completely deterministic, either.

**(d) Self-reinforcing processes (i.e. stabilization):** Encompasses the four self-reinforcing mechanisms, which are driven by positive feedback, are socially and materially embedded, and generate momentum and growing rigidity.

- (e) **Lock-in (i.e. consolidation):** Describes the situation/outcome of the path process, where one solution dominates and alternatives are hardly conceivable or legitimate.
- (f) **Multiple actors (i.e. social embedding):** Paths are enacted by two or more actors and therefore a collective phenomenon – they only emerge through the interaction of different actors or organizations, which are bound together by sets of relations.

Building on the lock-in logic outlined above, the following section turns to the question of how scope for action can be restored after a dominant action pattern has taken the lead, leaving little to no space for alternatives. Within the path-dependence literature, the minimal condition for such a restoration is described as the “*effective restoration of a choice situation – the insertion of at least one alternative course of action*” accompanied by the crucial qualification that “*opening the window for an alternative is necessary but not sufficient. The new alternative has to be a superior one*” (Sydow et al., 2009, p. 702). Breaking a path therefore requires a focus on the very drivers of rigidity –, the self-reinforcing mechanisms: “*escaping from or breaking a path depends very much on interrupting the logic and the specific energy of the self-reinforcing patterns of the process in question*” (Sydow et al., 2009, p. 702). Later contributions translate this insight into a more practice-oriented perspective, arguing that “*mechanisms’ interruption constitutes a key lever, over time, to overcome the organizational inscription of a path*” (Fortwengel & Keller, 2020, p. 1171). This argument remains consistent with the earlier observation that self-reinforcing effects not only infuse daily practice but also become “*inscribed in the organizational structures that guide and support this practical activity*”, which explains why any attempt to reverse such inscription requires sustained and deliberate interruption over time to unwind what has already been stabilized (Fortwengel & Keller, 2020, p. 1195; Koch, 2011).

In general, within the literature a conceptual distinction is made between two modes in which a path break may unfold. The first is unintentional and exogenous in nature: *“path dissolution...occurs unintentionally in a sequence of events leading to the weakening of self-reinforcing mechanisms”* – typically triggered by technological shifts, regulatory interventions, or the entry of new actors who establish different practices (Apajalahti & Kungl, 2022, p. 231). The second mode is more intentional and endogenous – *“path breaking is a result of an intentional attempt to change the existing patterns”* – in which actors purposefully seek to weaken the very mechanisms that had maintained them (Apajalahti & Kungl, 2022, p. 220). Together, these two modes depict both externally induced path break and purposeful intervention from within.

Even when purposeful intervention is possible, ‘direct command’ remains a weak instrument as *“the scope for an organization to unlock path dependence simply by order is clearly limited”* (Sydow et al., 2009, p. 703) and against a dynamic that reproduces itself behind the *“actors’ backs”* (Schreyögg & Sydow, 2011, p. 322). The empirical simulation by Petermann et al. (2019) confirm this point, showing that hierarchical authority may intervene in the early stages, but once self-reinforcement gains momentum, formal authority tends to become too weak in regard to the self-reinforcement. Hence, path break rarely begins with a command – it is in need of observation. Within literature, this has been described as introducing an *“external lens or...a second-order observation”* that enables actors to reflect on daily practices and thereby *“open a window for path-breaking activities.”* (Sydow et al., 2009, p. 703).

Once such an observational or external lens is established, the practical work of weakening the self-reinforcing mechanisms must be addressed. As these mechanisms influence organizational practices differently, they also require different strategies of weakening (Fortwengel & Keller, 2020; Sydow et al., 2009). As Sydow et al. (2009, p. 703) already noted, learning-driven

paths tend to be especially 'sticky', sometimes demanding a “(possibly costly) subsidy to help the new alternative catch up” to the performance of the old. Coordination-driven paths, in contrast “depend on the willingness to conform to rules and therefore require a new regime of rules mandated by a change agent or a project group” (Sydow et al., 2009, p. 703).

In line with the need to weaken the self-reinforcing mechanisms is the fact that a break is rarely an instantaneous shift from one monolithic pattern to another. Instead, it unfolds as a process in which a “critical path release juncture” first loosens practices from the prior pattern, followed by a “path creation juncture” that begins to structure the new trajectory (Sminia et al., 2024). This highlights that breaking a path not only means letting go of the previous path, but also purposefully building a new one that offers a viable and legitimate alternative.

The viability of a new course of action at this stage depends on the extent to which self-reinforcing mechanisms have weakened and how well new alternatives are supported. To gain momentum, a new path must differ from but also stay connected to the existing pattern in order to sustain organizational coherence. In this regard, “related variety constitutes an underdetermined and insufficient, but necessary, condition for any concept of path-forming or path-breaking” as it broadens the range of options while maintaining feasibility (Sydow & Koll, 2017, p. 195). Zientara and Müller-Seitz (2024) illustrate this dynamic by showing how organizations sustain related variety through the deliberate coexistence of old and new logics. In their study, traditional and agile approaches were intentionally maintained in parallel, balancing stability and renewal: the established path ensured operational reliability, while the emergent one created space for exploration and learning. Such coexistence embodies a practical form of related variety, allowing experimentation without losing functional integration. Yet, when both logics begin to compete for the same resources and hinder each other, this balance may shift into “paralyzing parallelism” (Zientara & Müller-Seitz,

2024, p. 11), underscoring that related variety requires careful orchestration to support transformation instead of stagnation.

Taken together, these insights underline how a path can be broken. In order to ease this process, research also describes the prevention of detrimental lock-in through the monitoring and continuous surveillance of ongoing path-building processes. This enables the discovery of escalating dynamics early on, which, if left unchecked, later require interruption. Such an early intervention is preferable – especially from a management perspective – *“so early that a lock in can be avoided”* and this can be *“pursued with targeted path monitoring”* (Schreyögg, 2014, pp. 15–16). The proposed setup is an action-reflection arrangement that differentiates between *“the concrete level of daily work executions (and thus the level of possible path building) and an observation level which seeks to identify the potential development of path dependence at an early stage through monitoring”*. Its task is to *“develop indicators for the early detection of paths and – through their observation – continuously assess the risks of a possible emergence of path dependence”* (Schreyögg, 2014, pp. 14–15).

This resonates with the abovementioned recommendation by Sydow et al. (2009) to establish an external lens before acting. It also echoes empirical findings showing that organizations can *“regain their scope for maneuver”* once they make visible the places where and how coordination, complementarity, learning, and adaptive expectations are actually locking them in (Fortwengel & Keller, 2020, pp. 1170–1171). Therefore, monitoring is more of a diagnostic exercise, which represents a practice of reflexivity that sustains the organization’s ability to intervene before self-reinforcing mechanisms gain momentum and become inflexible and rigid over time.

The caution of self-reinforcing mechanisms is also a condition and must be made explicit, as not every collection of “events” qualifies for a path break. As Dobusch and Kapeller (2013, p. 294) stated *“path dependency without a mechanism is nothing more than a recognition that history matters”*.

Therefore, the articulation of the specific mechanisms prevents theoretical overextension and guides the design of strategies to effectively interrupt them. At the same time, it also “protects” actors from misreading the effectiveness of being path dependent. As Sydow et al. (2020b, p. 720) emphasize “*No, path dependence is not always dysfunctional, but it is likely to lead to a dysfunctional situation*” because over time a rationality shift can occur, whereby the logic that once ensured efficiency turns into a source of rigidity and inefficiency. Recognizing that potential threat and analyzing it systematically thus becomes a necessary part of any mechanism-based account of path break.

Taken as a whole, the literature indicates that path breaking generally unfolds through two interrelated steps, beginning with a diagnostic phase that reveals the underlying self-reinforcing mechanisms sustaining the existing path – often with the help of an external lens that allows actors to recognize how the path is maintained. This is then followed by a set of interventions focused on the four self-reinforcing mechanisms that interrupt the running feedback loops. Then, a new course of action must be implemented by mobilizing related variety, so that a viable alternative can be enacted rather than merely envisioned. Sustained effort is also needed to let the old pattern unwind as the new one gains plausibility and legitimacy – the theory distinguishes this as a shift from release to creation. Hence, the bar for calling such change a path break remains deliberately high: the alternative must be not only visible but realized as a credible choice (Sydow et al., 2009, p. 702).

Taken together, organizational path dependence conceives paths primarily as a processual dynamic – “path dependence is first of all a process” – (Sydow et al., 2009, p. 690), which illustrates that history matters by imprinting current actions without fully determining the future. The four self-reinforcing mechanisms therefore build the core of this process by solidifying certain activities and practices into specific patterns, which are

reproduced over time, culminating in a lock-in state (Schreyögg & Sydow, 2011; Sydow et al., 2009, 2020b). Yet, this very process logic raises a crucial question: If paths are stabilized through self-reinforcing structures, how much scope for action really remains for organizational actors? And how can actors use that remaining residual scope to influence or even break such processes? These questions illuminate the influence of actors' agency and follow from, with a necessary translation, a partly objective, processual ontology to a social, constructivist ontology (Kremser & Sydow, 2022), which is depicted within Chapter II.3.

### **II.3 Traces of a Social-Constructivist Ontology within Organizational Path Dependence**

As stated in Chapter II.1, early models of path dependence conceived paths as largely objective, techno-economic processes driven by increasing returns and positive feedback, explaining why organizations become entrapped in quasi-deterministic dynamics with limited scope for actors' influence. Within this logic, initial conditions – like early decisions, technological standards or random events – are assumed to be given (rather than constituted) and paths, once triggered, continue on their own while actors act within them, but do not orchestrate them (Arthur, 1989, 1994; David, 1985; Schreyögg, Sydow, & Koch, 2003; Sydow et al., 2009). Thus, path dependence often appeared in a “*strong view*” (Fortwengel & Keller, 2020, p. 1174). Yet, even this strong view kept a crucial processual nuance: the path must be enacted and reproduced by “*knowledgeable agents*” (Sydow et al., 2009, p. 695), which implies that actors still have a degree of choice, even though behavior is strongly guided by structures. In short, structure weighs heavily, but never fully extinguishes agency (Schreyögg, Sydow, & Koch, 2003; Sydow et al., 2009, 2020b).

As the discussion and literature evolved, the question on the role of agency moved to the forefront: how can organizational actors still act once a path has stabilized and the scope for alternatives has significantly narrowed? And if structures are this heavy, how is agency even possible? These aligned questions challenged the largely deterministic ontology of path dependence, calling for a debate about agency and a stronger social-constructivist perspective.

Therefore, Garud and Karnøe (2001) introduced the idea of path creation, stating that “*path creators are boundary spanners who disregard myopic pressure from existing relevance structures by making mindful deviations with objects to create new futures*” (p. 1). In other words, actors within organizations create new paths within existing institutions, routines, and technologies rather than remaining at the mercy of historic and random events shaping the future. They’re therefore embedded within the structure, but they are able to reflect on it and consequently break free from it while mobilizing others to create (Garud & Karnøe, 2001). Schreyögg, Sydow, and Koch (2003) took this constructivist impulse and translated it into organization theory, and linked it back to the process logic of path dependence. They thereby conclude that a path can be shaped and “*mindful deviation and generating momentum is crucially dependent on actions of the involved actors*” (p. 285), yet agency still remains restricted. Therefore, path creation should be constituted as a social process that connects self-reinforcing dynamics with organized, collective action (“*collective entrepreneurship*” (p. 285)).

Garud et al. (2010) later expanded the path creation concept by stating that agency “*is full blown and located in individuals*”, conceptualized “*as being distributed and emergent through interactions of actors and artefacts that constitute action nets*” (p.761) and lock-in becomes “*a temporary stabilization of paths-in-the-making*” rather than an end state (p. 760). In this regard, initial conditions do not simply exist; instead, they are socially

created through practice by ‘active actors’, who create new futures by “*mindful deviation*” (Garud & Karnøe, 2001, p. 1; Garud et al., 2010). Against this backdrop, they introduced an outsider’s and an insider’s ontology highlighting the differences between organizational path dependence (Sydow et al., 2009; Vergne & Durand, 2010) and path creation. The following Table 3 highlights the main differences.

Dimension	Outsider’s Ontology	Insider’s Ontology
<b>Reference</b>	Path dependence	Path creation
<b>Initial conditions</b>	Given	Constructed
<b>Perspective</b>	Organizations are viewed from the outside, i. e. an observer’s perspective; more analytical	Looks at processes from the inside – meaning from the perspective of those who are involved; more experience-based; more entrepreneurial
<b>Contingencies</b>	Exogenous and manifest as unpredictable, and somewhat random events	Emergent and serving as embedded context for ongoing action
<b>Scope of action and role of actors</b>	Low - structures dominate and actors are passive	High - actors can actively create, improvise and learn
<b>Self-reinforcing mechanisms</b>	Given	Strategically manipulated by actors
<b>Lock-in</b>	Stickiness to a path or outcome absent exogenous shocks to the system	Provisional stabilizations within a broader structurational process

**Table 3** *Outsider’s vs insider’s ontology (adapted from (Garud et al., 2010, p. 769)*

This outsider's vs. the insider's ontology was further developed by Fortwengel & Keller (2020), who empirically studied how path dependent organizations "*regained scope to maneuver*". Thereby, they found two views on agency – the weak and strong view. The weak view aligns with Garud et al.'s (2010) description of an insider's ontology – a perspective grounded in the lived experience of embedded actors who consciously engage with self-reinforcing mechanisms rather than being dominated by them. In this understanding, agency is reflexive, meaning that actors can purposefully trigger, steer and redirect the development of paths. Building on this assumption, weak-view scholars argue that actors are aware and can intervene in the very structures that both enable and constrain their actions. Furthermore, they can interpret the past and mobilize it as a resource for future action, showing that history is not a constraint but a strategic and narrative resource (Vergne & Durand, 2011). This perspective embodies an interpretative and projective orientation of agency (Emirbayer & Mische, 1998, p. 971; Fortwengel & Keller, 2020, p. 1174).

In contrast, the strong view adopts an *outsider's ontology*, emphasizing structural dominance and the largely unintended character of path-dependent processes (Schreyögg & Sydow, 2011, p. 322), which lead through iterational and habitual agency (Emirbayer & Mische, 1998, p. 971; Fortwengel & Keller, 2020, p. 1174) to "*rigidified action patterns*" (Sydow et al., 2009). Agency, therefore, becomes largely decentralized and therefore reproduces existing structures rather than transforming them (Dobusch & Schüßler, 2013, p. 618; Fortwengel & Keller, 2020, p. 1175). Yet, the strong view is extended by Fortwengel and Keller's (2020) empirical study, in which they showed how path dependent organizations regained scope to maneuver. This added an interventionist element to the strong view "*through a targeted interruption of the working of these mechanisms, hyper-stable patterns inscribed in an organization can be gradually rewound – and alternative futures become possible*" (Fortwengel & Keller, 2020, p. 1172).

Thus, those interruptions do not emerge endogenously – they still require external impulses, new resources, or the introduction of an external lens as a substitute for actors' reflexivity. Only then are actors able to unwind the underlying self-reinforcing logic of a path. Based on these findings, agency does not oppose structure but operates through it, by exposing how learning, complementarity, coordination, and adaptive expectations stabilize the organization – and by deliberately intervening in these mechanisms. Consequently, agency is located within coordinated practices, which develop it. This is in line with Giddens (1984b) and his conception of structure and agency as a dual relationship, in which structure shapes action, while at the same time, action reproduces and transforms structures. In sum, the debate evolved beyond a simple “path dependence vs path creation” distinction towards a theoretical integration. Sydow, Windeler, Müller-Seitz, and Lange (2012) therefore introduced the concept of path constitution: *“The concept of path constitution attempts to integrate the concepts of path dependence and creation. Instead of ‘mixing ontologies’ (Garud, Kumaraswamy and Karnøe 2010), this concept offers a constructivist understanding in which path dependence and path creation are only two possible ways to build and transform a path in time and space. [...] In line with received path dependence theory, our understanding of technological, institutional or organizational paths always implies a certain degree of path dependence in the sense that path processes, even if they are intentionally created, show a kind of irreversibility, momentum, and possibly lock-in. The central idea of path constitution is the call for a theoretical understanding which acknowledges the recent constructivist turn in path research”* (p. 158). Furthermore, the aim of that paper was to develop a *“comprehensive methodology that originates from the concepts of path dependence and path creation”* (p. 155) resulting in the path constitution analysis (PCA). This analysis *“borrows the notion of constitution, the concept of the duality of structure in interaction, and the understanding of*

*knowledgeability from structuration theory*" (Sydow, Windeler, Schubert, & Möllering, 2012, p. 912). Empirically, this 'structurationist' integration was illustrated by the study of Sydow, Windeler, Schubert, and Möllering (2012) in order to "*analyze practices of path constitution*" (p. 907). Consequently, path constitution is taking on a constructivist process ontology, where paths are both stabilized and transformed through the ongoing practices of actors.

Against this backdrop, the question arises, if paths are continuously constituted through practices, "*how are [these] practices produced, reproduced, connected and eventually transformed by practitioners*" and more specifically, "*how would a focal practice be performed if it were enveloped in a self-reinforcing dynamic?*" (Kremser & Sydow, 2022, p. 1) . The realm of practice theory therefore provides the vocabulary to translate the self-reinforcing dynamics into the "*lived life of organizations*" and furthermore allows "*in situ*" analysis, rather than only providing ex post explanations, by maintaining an explicit focus on processes (Kremser & Sydow, 2022, p. 1). The following section therefore introduces three complementary practice-theoretical frameworks – Bourdieu's Theory of Practice (Bourdieu, 1977, 1990), Giddens' Structuration Theory (Giddens, 1979, 1984b), and Schatzki's Site Ontology (Schatzki, 1996, 2002) – which have been used predominantly in management and organization studies (e. g. the practice turn (Schatzki, 2005; Schatzki et al., 2001). Each study focuses on understanding how structure and agency interweave in the reproduction and transformation of paths, therefore offering a broad range of practice-based research. Yet, there are key commonalities: Practice-based approaches adopt a processual perspective on social practices, conceiving agency and structure as mutually constitutive – a duality rather than a dualism. In this view, actors utilize structures that are being kept alive by their own actions, thereby linking the micro-dynamics of day-to-day activities with the macro-patterns of institutional configurations (Seidl & Whittington, 2014). This perspective thus bridges objectivist and subjectivist

ontologies by emphasizing how small, situated actions gradually shape broader institutional configurations, which in turn guide what actors will do next (Kremser & Sydow, 2022, pp. 5–6). Or in other words, “*practitioners [...] are drawing on more or less intentionally selected structures that are often conceptualized as being the aggregate outcome of the continuous reproduction of reflective praxis*” (Kremser & Sydow, 2022, p. 5).

Against this backdrop, Kremser & Sydow (2022) are “*pointing out insights for practice-based understanding*” (p. 6) within self-reinforcement per practice theorist.

Pierre Bourdieu offers a practice-oriented lens and focuses on “*the structural tension between dominant and dominated actors within any (organizational) field*” (Emirbayer & Johnson, 2008, p. 8). The explanatory core here consists of three interrelated concepts: habitus, field and capital. The notion of habitus describes a system of embodied habits, which individuals acquire within intra- and intergenerational socialization processes – for example ways of perceiving, judging and acting. These dispositions explain why social behavior tends to reproduce itself as people act with an orientation on familiar action patterns, which in turn stabilize the social structures from which they originate. Therefore, the habitus inherits a generative quality of producing and reproducing structures, while this process “*remains generally unknown to knowledgeable actors*” (Bourdieu, 1990; Kremser & Sydow, 2022, p. 6). The field describes the social terrain where actors who are differently endowed with different forms and volumes of capital try to sustain or alter their position within a given field. Every field thereby inhibits its own set of rules and logics, which seem to be valuable or powerful for that specific field (Emirbayer & Johnson, 2008, p. 6). Through sustaining and altering positions within the field, power relations emerge while making fields dynamic as actors try to enforce their own interests. These power relations (or social orders) therefore determine which practices gain legitimacy and which remain marginal, rendering stability the outcome

of an ongoing interplay between embodied habits and structural configuration. The capital – which can be economic, cultural, social or symbolic – “*therefore provides the ‘social energy’ and momentum that drives the transformation of the social fields*” (Emirbayer & Johnson, 2008, p. 6; Kremser & Sydow, 2022, pp. 6–7). From the perspective of self-reinforcing processes – like path dependence – the recursive reproduction of social positions and power hierarchies represents a central mechanism of stability. Yet, as Kremser and Sydow (2022, pp. 3–4) note, Bourdieu’s framework remains largely centered on the individual and the field. It shows how actors or social fields become the locus of reinforcement but less how the practices themselves gain momentum and evolve into path-like dynamics. For analysis of self-reinforcement in practice, the Bourdieusian lens is too disposition-oriented and too static to capture the situated unfolding of practices that constitute ongoing paths

Giddens’s structuration theory (Giddens, 1979, 1984b) on the other hand, provides a central foundation for a social-constructivist understanding of path-dependence (Sydow et al., 2009; Sydow, Windeler, Müller-Seitz, & Lange, 2012; Sydow, Windeler, Schubert, & Möllering, 2012). The core of this theory aims to enhance the understanding of how social systems continuously develop and assumes that they are constituted by the interactions of knowledgeable actors. These interactions in turn are recursively formed by the structural properties of the very system. Therefore, the interactions as well as the structural properties “*are both the medium and the outcome of practices that constitute the systems*” (Giddens, 1979, p. 69). This assumption is described as the duality of structure, which maintains continuity through recursive reproduction, yet always leaving space for reinterpretation and change. This is due to the knowledgeability of actors, who can reflexively monitor their actions (Giddens, 1984b). Yet, “*actors do not know everything, for they always act against a background of unacknowledged conditions. What is more, they produce intended as well*

*as unintended consequences and act largely on the basis of practical rather than discursive consciousness* (Kremser & Sydow, 2022, p. 8). This partial awareness explains why self-reinforcing mechanisms may evolve behind the actors' backs (Schreyögg & Sydow, 2011, p. 322) yet depend on their continuous enactment. In addition, Giddens's dialectic of control underscores that even under tight structural constraints, actors can always act otherwise. Power, defined as "*the capability of making a difference to a course of events*" (Giddens, 1982, p. 200), arises from mobilizing resources of domination, signification, and legitimation that sustain social order over time.

In sum, Giddens allows path dependence to be conceptualized as a recursive dynamic rather than a rigid constraint – structures persist only because people continuously reproduce them through their daily practices and once they start to act differently, the structure itself begins to change. This perspective makes it possible to understand how stability and change coexist within organizational processes: self-reinforcing mechanisms gain momentum from the repeated enactment of routines, while reflexive monitoring allows actors to reinterpret and occasionally redirect these routines. Thus, Giddens's framework clarifies how paths endure through practice, and at the same time, how reflexive agency can transform them. Yet, this lens remains too abstract and too "*coarse-grained*" when it comes to explaining the micro-mechanisms and practices through which this reproduction and transformation unfold in everyday organizational life (Kremser & Sydow, 2022, pp. 8–9).

Finally, Schatzki's work on the "*site of the social*" (Schatzki, 1996, 2002) takes the practice discussion in a new direction, while his approach has no clear explanatory focus but offers a flat ontology "*inviting open-minded investigations into why things are happening specifically in the here and now*" (Kremser & Sydow, 2022, pp. 9–10; Seidl & Whittington, 2014, p. 1416). His key assumption, therefore, is that nothing in the social realm happens in

isolation but in a specific context of human coexistence. This context (the site of the social) is defined as “*a mesh of practices and material arrangements*” (Schatzki, 2002), which shifts the focus away from individuals or structures towards a “mesh” of doings, sayings, and material arrangements that together constitute everyday reality. The description of a mesh is established within three core concepts: social practices, material arrangements and linkages (nexus).

Social practices are defined as “temporally evolving, open-ended sets of doings and sayings linked by practical understandings, rules, teleo-affective structures, and general understandings” – conceived as internal organizing principles (Schatzki, 2002, p. 87). Practical understandings refer to the embodied know-how that enables people to act competently in specific situations – such as knowing how to hold a meeting or operate a machine. Rules are explicit, often verbalized descriptions or norms that guide what counts as acceptable or appropriate action within a practice. General understandings capture broader principles and shared interpretations – such as fairness, professionalism, or trust – that provide a sense of legitimacy and coherence across practices. Teleo-affective structures link understandings and rules to actors’ goals, purposes, and emotional attachments, shaping why people pursue certain ends and what they value in doing so.

The second concept, the material arrangements anchor and stabilize social practices by providing a tangible infrastructure, while in turn they can enable and constrain them. For example, an office layout enhances collaboration, or a software system defines what can be done and what not. Social practices and material arrangements are therefore mutually constitutive: practices give meaning to things and those things in turn prefigure how practices unfold (Kremser & Sydow, 2022, pp. 8–10; Schatzki, 2016, p. 5). Finally, the linkages – or more precisely the system of linkages, the nexus – describe(s) the relationship between the practices, arrangements and entities (for example, human beings or artifacts), which

are holding the 'social site' together. Within this nexus, repeated connections between these linkages generate patterns "*that prefigure the flow of activity*" (Kremser & Sydow, 2022, p. 10; Schatzki, 2002). Therefore, stability emerges from within the mesh itself, without external structures.

Against this backdrop, and by conceiving the social world as a nexus of practices and material arrangements, Kremser and Sydow (2022, pp. 9-11) derive the conclusion that Schatzki's practice theory offers the most suitable lens of all three for understanding self-reinforcing processes. As they emphasize and explain, Schatzki's flat ontology – which treats all elements of the social as equally real and mutually independent – provides the ideal conceptual base for analyzing self-reinforcement 'in vivo' and 'in situ', as it avoids micro versus macro structures. It therefore offers a conceptual vocabulary for tracing how recurring linkages between human activity and material setups gain stability and persistence over time. Within these linkages, self-reinforcement becomes visible when certain actions and arrangements are continuously performed together, and they gain momentum guiding how future actions unfold. Therefore, it captures what path dependence actually describes. In this sense, paths are not external structures detached from practice but emerge within the very mesh of everyday doing, saying, and material engagement. Therefore, Kremser and Sydow (2022) selected Schatzki's flat ontology as the most suitable candidate for a theoretical integration and for developing "*an account of self-reinforcement of practices in praxis*" (p. 11). In doing so, they defined performative linkages as the "*locus for self-reinforcement*" instead of the performing actor (Kremser & Sydow, 2022, p. 12). A performative linkage is a chain of actions in between two practices, where the enactment of one practice is "*bringing about change in the world, which is taken up by actions that enact some aspect of another practice*" (Kremser & Sydow, 2022, p. 12). They therefore mutually enable and constrain each other, while a set of performative linkages is building the nexus of self-reinforcement.

Furthermore, they defined three conditions to specify which performative linkages (or which nexus) initiate self-reinforcement. The first condition is the notion of positive, deviation-amplifying feedback between practices. This describes the bidirectional relationship between two practices, where a deviation in one practice (practice A) – due to a new or unexpected event – triggers a deviation within another practice (practice B). This reaction then circles back to affect practice A and turns back again to practice B. These back-and-forth iterations lead to mutual adjustments, which develop into a recurring pattern, which strengthens the linkage between them and begins to stabilize itself (Kremser & Sydow, 2022, p. 13). The second condition describes the minimum frequency of reproduction, which states that the deviation-amplifying feedback “*needs to be continuously re-enacted and thereby remembered in practice*” (Kremser & Sydow, 2022, p. 13). Because those linkages exist between different practices, this remembering is distributed – meaning that each practice re-enacts its part of the linkage within its own routines and for its own reasons. Over time, this repeated re-enactment normalizes the linkage and embeds it into everyday activity.

Finally, the third condition captures the necessary accumulation of reproductive resource, which generates the momentum to sustain itself. The repeated re-enactment of the doings and sayings reshapes and co-constitutes the internal organizing principles and material arrangements. If these adapt to the new patterns, they start reinforcing each other over time and therefore stabilizing the process (Kremser & Sydow, 2022, p. 13-16).

Against this backdrop of agency, reflexivity, recursive and/or bidirectional relationships, practice theories, self-reinforcement and path dependence, the question arises whether there are any traces of a more praxeological- (site-) ontology within the constructivist oriented research of “*modern path constitution*” (Stache & Sydow, 2023, p. 355) within recent years. In other words, are there traces within research that studied different practices

constituting self-reinforcing mechanisms leading to path dependence or path break.

Kremser & Sydow (2022, p. 11-12) already stated that “*to the best of our knowledge, no empirical study has leveraged Schatzki’s theory to inquire into self-reinforcement in management and organization studies*”. Yet, there still are traces of practices through the application of Giddens’s Structuration Theory within research, as well as single explicit and implicit notions of practices. In the following, a selection of studies and their implications for an enhanced praxeological understanding of path dependence are highlighted (in a chronological order).

### **Inscribed Strategies: Exploring the Organizational Nature of Strategic Lock-in (Koch, 2011)**

The work of Koch (2011) aims to provide “*a better understanding of the organizational nature of lock-ins by exploring the role and impact that the organizational context has on a strategic path*” (p. 338). He defined the term path inscription, explaining that self-reinforcing mechanisms inscribe themselves into organizational structures, routines and technologies through repeated actions (‘organizational body’). This inscription process is further differentiated into mechanisms inscription and pattern inscription. Mechanisms inscription depicts the inscription of self-reinforcing mechanisms on an organizational-material level (e.g. the incentives and strategy are aligned to support the strategy (complementarity)). The pattern inscription depicts a deeper social-cultural level. The latter is the decisive factor, as it significantly influences the range of strategic alternatives existing. In other words, the degree of depth at which the pattern is lived in the organizations through narrations, power, and values. The stronger this pattern inscription is, the more likely it is that new ideas will be rejected (as they do not fit into the existing pattern), or employees and leaders are recruited who share the same values and all this therefore characterizes the

strength of a lock-in. Koch (2011, p. 338) therefore suggests “*maintain[ing] a disconfirming organizational context*”. In other words, organizations can mitigate their lock-in if they maintain a balance between stability and openness in their thinking, routines and culture. These insights show that the lock-in (and its degree) is lived and constituted through discursive practices – i.e. doings and sayings (Schatzki, 1996) – that can be counterbalanced actively by being reflexive and observative in order to question one’s own behavior and thinking.

### **Organizing R&D Consortia for Path Creation and Extension (Sydow, Windeler, Schubert, & Möllering, 2012)**

This seminal work by Sydow et al. (2012) applies structuration theory to directly “*analyze practices of path constitution*” in order to “*capture the active agency involved in collective efforts aimed at extending a current technological path and, in parallel, at creating a new path in the field of leading-edge international semiconductor manufacturing*” (p. 907). In doing so, the ask “*how collective agency makes use of organizational forms such as interorganizational networks*” in shaping technological trajectories (p. 909). Empirically, they compare two cases while one extends its technological path of optical lithography (Liquid Immersion Lithography – LIL) by building established rules, infrastructures and relationships. The other case newly created a path with new radical technology (Extreme Ultraviolet Lithography – EUVL) by building new alliances, legitimations and shared resources. Their results thereby explain how technological paths are collectively organized, actively and reflexively produced, and are thus not accidental outcomes. Importantly, R&D consortia such as SEMATECH (for path extension/LIL) and EUV LLC (for path creation/EUVL) act as “*locales of collective agency*” (p. 916) where firms coordinate cooperation, mobilize funding, and establish shared rules and meanings – “*labelling a field of activities as ‘pre-competitive’ to join forces with even [their] closest*

*competitors*” (p. 918) – making them the central practical arenas through which technological paths are constituted. From a praxeological view, Sydow et al. (2012) show that path creation and extension are not abstract processes but emerge through everyday practices of coordinating, legitimizing, and aligning within R&D consortia. These activities reflect the situated doings through which technologies and relations are reproduced and stabilized. In this sense, consortia are practical arenas where paths are collectively enacted.

### **The means of managing momentum: Bridging technological paths and organisational fields (Schubert et al., 2013)**

The study by Schubert et al. (2013) examines “*how technological and organizational changes are mediated through different means of mutually monitoring and collectively coordinating technological developments*” (p. 1389). They therefore ask how technological paths are collectively produced, maintained or redirected through coordination mechanisms such as roadmaps, conferences and R&D consortia. These coordination tools are the “*means managing momentum*” and explicit practices that organize how actors collectively monitor, evaluate and align technological development. They therefore interpret them as transformative agencies and tools that both shape and are shaped by the field (Giddens, 1984b). In this sense, momentum does not simply happen: it is enacted practically through recurrent coordination, evaluation and legitimization practices. Technological paths are therefore sustained and re-shaped through ongoing social practices of coordination and sensemaking. In this sense, momentum is depicted as a practice phenomenon, which emerges and feeds back into self-reinforcing dynamics by means of constitutive practices like evaluating, aligning, and technological development enacted through roadmaps, conferences, and R&D consortia.

**How interorganizational networks can become path dependent: Bargaining practices in the photonics industry (Burger & Sydow, 2014)**

In this seminal work, the authors examine “*under what condition exactly do bargaining practices become not only inert but path dependent?*” (p. 75). They derive nine empirical indicators along the single path phases which can be used as a monitoring scheme to observe when flexibility is shifting towards a lock-in state. The authors state that the indicator “*15: A self-reinforcing mechanism explains why the first increase led to the second increase. [...] ...is the most complex to show empirically*” (pp. 77-78), while coordination and complementarity “*seem by far the most likely mechanisms driving the (inter-) organizational path dependence of bargaining practices*” (p. 79). Within the empirical study, they then further developed sub-indicators for the two self-reinforcing mechanisms, while mapping the practices of the network participants and deriving the results concerning whether and how bargaining practices moved from flexibility to stability (pp. 93-95). In this seminal work, bargaining practices themselves can become path dependent and lose flexibility within their execution as recurring activities but at the same time, they can also constitute and foster path dependence within networks.

**Path dependence and the stabilization of strategic premises: How the funeral industry buries itself (Wenzel, 2015)**

Wenzel (2015) studies the relationship between organizations’ strategic premises and path dependence as organizations “*pathologically reproduce their paths even in times of crisis*” (p. 265). He sheds light on why organizations hold onto certain strategic thought patterns even though their environment is changing dramatically – and sometimes even take this dramatic change as further confirmation for repeating the same the behavior. He finds four organizational and social mechanisms that reproduce the same strategic premises – tapering market feedback, rectifying market feedback,

framing consumer choice and shaping consumer choice (pp. 285-289). These mechanisms “*constitute either reflexive modes of process feedback or generative modes of producing market outcomes, they all inhibit a disconfirmation and, thus, an update of strategic premises*” (p. 265) and stabilize the strategic premises. These stabilized strategic premises therefore “*leave little scope for deviations from the established strategic pattern and lead to the pathological reproduction of the path*” (p. 267). Therefore, path dependence is not only inscribed within routines or structures, but also cognitively within the interpretations and assumptions of the actors. Therefore, organizations should continuously reflect on their strategic premises, institutionalize disconfirmations and foster discursive diversity, so that alternative interpretations remain conceivable and lock-in can be avoided or mitigated. Similar to Koch (2011), this seminal work shows which practices should be used in order to avoid or mitigate lock-in and how organizations process and generate feedback in such a way that it stabilizes existing premises.

### **Breaking a Path by Creating a New One: How Organizational Change Boosts Children’s Cancer Care (Stache & Sydow, 2023)**

This seminal paper by Stache & Sydow (2023) aims to further elaborate on the question of “*how to break an organizational path*”. Within their longitudinal study, they come to the conclusion that “*path-breaking change is an intricate process based upon distinct activities, and supported by mechanisms, directed towards the creation of a new organizational path*” (p. 351). This conclusion was derived from the specific two-fold research question: *Which activities facilitate breaking organizational path dependencies? How do these activities relate to each other as well as to self-reinforcing mechanisms that are usually held responsible for creating such dependencies in the first place?* (p. 356). They thereby found that alongside a necessary external lens, path-breaking requires “mindful

deviation” (Garud & Karnøe, 2001), “*disembedding from structure*” and “*generating momentum*” (Garud et al., 2010), which are all emphasized by path creation theory. Furthermore, strategic action alone is not sufficient – “*change needs to be enacted and promoted repeatedly*” (p. 367). Within their derived “*process model of path breaking organizational change*” they distil three levels of activities. The first refers to the previously mentioned external lens, here translated into referring knowledge – or more precisely recombining knowledge. This was crucial for successfully breaking the existing path, and consisted of activities like close collaboration, active editing and translating, and mutually integrating knowledge (p. 367). The second refers to the same self-reinforcing mechanisms, which “*do not necessarily lead to stability as it is known from path dependence research*” (p. 368). This new understanding suggests that self-reinforcing mechanisms can function as “*counter-mechanisms*” (p. 368): while such mechanisms usually stabilize existing practices – the more actors engage, the more entrenched they become – they can also be deliberately redirected to produce change rather than stability. This was due especially to the activity of convincing others to participate in using the joint standard – which the authors describe as “*crucial to enacting and redirecting self-reinforcing mechanisms*” and generating momentum (p. 368). The final and third stage they identified as the importance of “*communicating a superior organizational solution*” (p. 369). Here, the success factor provided credible communication and radical transparency to legitimize the new solution. These insights make this study a strong example of how a path break can emerge as the recursive outcome of organizational practices. From a praxeological perspective, they show that transformation is *done* through concrete, situated activities like recombining knowledge, convincing others, and communicating transparency.

### **Path Dependence and Integrated Care (Auschra & Sydow, 2025)**

In this paper, the authors aim to *“increase the understanding of hyper-stability of certain practices in health care as well as of the whole health system”* (p.1). They ask why integrated care reforms so often fail and argue that *“one often overlooked but important reason for the slow or entirely lacking implementation of integrated care is the path dependence of surrounding structures”* (p. 1). Surrounding structures thereby refer to the institutional, technological and organizational context of the whole health system. Furthermore, they show that self-reinforcing dynamics operate on multiple levels and therefore *“make deviations from existing paths extremely difficult”* (p. 7). This is why integrated care projects often remain limited, as *“the practice of integrated care can, once implemented, become path dependent in itself. That is even likely, because such practice is based on guidelines and routines that are well known to be a potential source of organizational path dependence”* (p. 2). From a praxeological view, they refer to four concrete strategies based on Schreyögg, Sydow, & Koch, 2003 in order to break or deviate from a path within the health care system:

- (a) A discursive approach that aims at spreading insights, for instance to reach consensus for changing existing health care practices;
- (b) A behavioral approach that puts less emphasis on cognition than on emotion, for instance to overplay personal short-term disadvantages;
- (c) A systemic approach that focuses more on the social structures than on the actor, for instance with the help of regulatory changes;
- (d) A resource-based approach that reallocates resources and, thereby, power which in health care may also require legal action.

### **Breaking organizational paths for strategic renewal: Towards a dialectical perspective (Janvier et al., 2025)**

In this seminal work, Janvier et al. (2025) pose the research question *“How can management maneuver self-reinforcing mechanisms when breaking an*

*organizational path for strategic renewal?*” (p. 2), that is, how to overcome strategic inertia without fully abandoning their structural ability. Within a longitudinal empirical study over a period of 10 years, they found four different phases (testing, deploying, assimilating and refining) of the path breaking process whereby “*upper management performed deliberate path-breaking interventions, each involving a trigger and experimentation, which was followed by firm-wide implementation*” (p.7). This process was shaped by two dialectics (p. 15): one between path breaking interventions and relapses into old routines, which in turn enhanced reflection triggering new interventions; and one between “*the actions of upper management and the firm at large*” (p. 2). This led to one conclusion that path dependence does not always have an inhibiting effect, but also becomes part of the change process itself through reflection and feedback. Therefore, relapses served as road signs rather than roadblocks (p. 15). Against this backdrop, path breaking emerges not only from top management initiatives but through recursive interactions across all hierarchical levels. Strategic renewal is therefore not achieved by replacing one logic with another but through recursive, iterative, and collective interplay between stability and change throughout the organization. Path breaking is thus not a top-down act but a multi-level practice enacted through reflection, experimentation, and feedback loops. In this sense, renewal is a lived process – a social practice unfolding in the everyday activities of coordinating, collaborating, and learning. This praxeological perspective illustrates how transformation is done through concrete organizational practices – workshops, meetings, and the iterative testing and refinement of routines (“doings and sayings”, Schatzki, 1996). The dialectic between stability and change is thereby embodied in everyday work such as planning sessions, feedback meetings, and cross-departmental coordination. In this sense, path breaking becomes a form of organizational doing: not the result of a single managerial decision,

but the recursive outcome of ongoing practical engagements that continually reproduce and reconfigure the organization's collective way of working.

Taking all these insights into account, it becomes clear that path dependence research has shifted from a positivistic and deterministic perspective to that of a socially constructed process. Furthermore, research increasingly emphasizes praxeological aspects, not only mere ex-post, or constitutive, objective explanations to shed more light on path dependence as an 'in vivo' or 'life lived forward' construct. The self-reinforcing dynamics at its core, therefore, are depicted as a "*maelstrom of doings and sayings that is increasingly difficult to control*" (Kremser & Sydow, 2022, p. 2). It becomes clear that "becoming" as well as "being" path dependent is a **recursive praxis**: paths do not simply exist, nor do they persist by themselves. They have to be continuously enacted by knowledgeable actors through doings and sayings that are organized by rules, understanding and teleo-affective structures – i. e. social practices (Kremser & Sydow, 2022; Ortmann et al., 2023; Schatzki, 2002; Sydow et al., 2009, 2020a). Therefore, paths gain *gestalt* (Sydow & Schreyögg, 2013) in the form of everyday practices that reproduce themselves or the very rules and resources they draw upon. In this sense, the described recursiveness is what Giddens (1984) refers to as duality of structure, where agency is never zero but structured – actors can act within the boundaries of the existing rules and resources, which in turn are shaped by their very enactment and are also reproduced or subtly redirected. As research was building on this structurationist foundation over the last approximately two decades, path dependence research has remained within a "Giddensian frame", which explains the processual logic of why stability emerges. It constructs a processual scaffolding explaining that social practices are re-enacted continuously in recursive loops, fed by positive feedback generating self-reinforcing momentum. However, the more recent practice-based work by

Schatzki (1996, 2002) and its theoretical integration by Kremser and Sydow (2022) now enriches this understanding by explaining the “fine-grained how” of the recursive process. The understanding of social reality as a nexus of interwoven practices and material arrangement enables the perspective that structures do not pre-exist but constitute the relationship patterns among practices as they unfold. Hence, stability and change emerge from the same practical performance that holds these nexuses together or causes them to unravel (Stache & Sydow, 2023).

This integration of both perspectives therefore allows for a fuller understanding and better empirical analysis of organizational path dependence: Giddens explains the “why” of stability – recursion, agency, and structuration – whereas Schatzki reveals the “how” – the practical accomplishment and coupling of practices through which stability is enacted and transformed. Paths are therefore not abstract processes but temporarily stabilized nexuses of practices, materially and discursively sustained in arenas such as workshops, consortia, or project routines (Schubert et al., 2013; Sydow, Windeler, Schubert, & Möllering, 2012).

Self-reinforcing mechanisms are therefore not abstract “black boxes” but bundles of practices that generate positive feedback through their recursive enactment. Coordination, for example, through standardization or negotiation (Burger & Sydow, 2014), learning through experimenting and repetition (Janvier et al., 2025; Leonard, 1995), complementarity through coupling systems or aligning incentives (Sydow et al., 2009, 2020b) and adaptive expectations through creating credible and viable solutions (and communication) (Stache & Sydow, 2023). This interplay of practices, and the agency (“actors can always choose differently” (Garud & Karnøe, 2010)) generates the very momentum that keeps a path alive – until new practices are implemented, feeding an alternative feedback loop. To feed an alternative loop – hence deviating from the existing behavior pattern and path – reflexivity and an external lens are needed to “*open a window for path*

*breaking activities*” (Sydow et al., 2009, p. 702) and to deviate mindfully (Garud & Karnøe, 2001) from the existing path by making self-reinforcing mechanisms visible because command-and-control and hierarchy alone do not suffice (Petermann et al., 2019). Reflexivity in this sense is not an abstract cognitive act but a diagnostic practice, which lets actors step outside their routine enabling them to subsequently intervene with and unwrite the inscribed mechanisms and cognitive patterns (Fortwengel & Keller, 2020; Koch, 2011; Wenzel, 2015). This is what Sminia et al. (2024) conceptualized as a dual sequence of path release and path creation: first, established linkages between practices loosen, opening space for variation; second, new linkages consolidate into emerging practice nexuses. This gradual unfolding also explains why relapses – the re-activation of prior routines – often occur during transformation. They should not be interpreted as failure but as indicators of an ongoing, iterative process of re-stabilization and change (Janvier et al., 2025).

Taken together, research shows clear traces of a social constructivist ontology and also of practices that are important within the process. Yet, as within the processes of forming and reforming a path, self-reinforcing mechanisms are at the core, and it is important to remember that “*path dependency without a mechanism is nothing more than a recognition that history matters*” (Dobusch & Kapeller, 2013, p. 294). This reminder underlines the requirement of mechanism-stringency: explanations of path dependence need to go beyond historical narration and specify conceptually how self-reinforcing mechanisms are enacted and sustained in practice. Accordingly, self-reinforcing mechanisms must be practically traced – their genesis, internal dynamics, and interaction over time need to be reconstructed in order to grasp how momentum actually builds up and persists within organizations. Yet, despite the centrality of self-reinforcing mechanisms in the theory, there is still no systematic, micro-processual reconstruction of their emergence and evolution: how they arise from

concrete practices, how they gain strength, follow temporal and logical sequences, and transform through ongoing work. This unresolved gap – a between the conceptual recognition of mechanisms and their empirical reconstruction in practice – builds the motivation for this study.

### **III RESEARCH DESIGN AND METHODS**

Drawing on the theoretical conceptual frameworks of path dependence and practice theory, the following chapter elaborates on the research design and methodological approach of the qualitative study conducted. The aim is to provide a transparent and systematic account of how the research was conceptualized and executed.

The chapter first introduces the research design and sampling strategy (Section III.1), outlining the rationale for using a single-case study approach, the criteria for case selection, and the sampling logic applied, as derived from the guiding research question. This is followed by a description of the research setting (Section III.2), which provides contextual background on the organizational environment, including structural and historical features. The third section (III.3) outlines the data collection methods, detailing the design of the interview protocols, the integration of observational and archival data, and the procedures used to ensure depth and credibility. Finally, Section III.4 explains the data analysis process, comprising the application of Gioia methodology and temporal bracketing analysis, coding procedures, and the iterative development of a data structure leading to theoretical insights.

#### **III.1 Research Design and Sampling Strategy**

The design of my empirical study builds on the theoretical groundwork laid out in Chapter II and aims to deepen the understanding of how self-reinforcing mechanisms are formed and constituted within the path dependence process. While prior research has focused on defining what a path is, the role of agency in its formation, and how to potentially break lock-in stages (Fortwengel & Keller, 2020; Garud et al., 2010; Sydow et al., 2009, 2020b), most of it has remained retrospective emphasizing ex-post explanations and therefore being characterized largely by an objective,

substantialist logic (Kremser & Sydow, 2022). What remains underexplored is how the four central mechanisms - coordination, complementarities, learning, and adaptive expectations - are enacted, stabilized, and reinforced through everyday practices. A translation gap from theory into lived organizational reality exists, which motivates my empirical study. The purpose is thus to answer the following research question:

### **How do self-reinforcing mechanisms develop and remain in force?**

To address this question, I used a qualitative and inductive research design in which organizational practices form the primary unit of analysis, as they constitute and govern the development of self-reinforcing mechanisms and 'organizational life' (Kremser & Sydow, 2022; Schatzki, 2002). By examining practices across different organizational levels – from strategic design in top management, through translation by middle management, to operational execution – the analysis aims to show how mechanisms take shape and are reproduced throughout the organization. While the study is mainly exploratory, descriptive elements have been necessary to capture the concrete manifestations of these practices, and explanatory elements have helped to interpret their interrelations. Given this practice-based focus, it became clear that the design had to allow close observation over time in order to grasp the subtle, iterative nature of these dynamics.

Therefore, I chose and conducted an in-depth, single-case study with ethnographic elements, as this design suited the complexity and context-dependent development of the processes (Eisenhardt, 1989; Yin, 2016). This was particularly relevant for the context of my research desideratum to study path dependence, where historical decisions, institutional legacies, and current practices are closely intertwined and self-reinforcing mechanisms are also operating across different organizational levels, often over long timeframes and 'behind the agents' back' (Sydow & Schreyögg,

2013, p. 322; Garud et al., 2010). Such dynamics require sustained, embedded engagement to trace how reinforcing patterns emerge, stabilize, and potentially change, thereby strengthening the rationale for the chosen case study approach.

The case selection was closely linked to the rationale for the case study approach. Given the explorative nature of my research question, I selected LSC using a purposive, theoretically driven sampling strategy to align the empirical setting with the theoretical constructs of path dependence in an iterative manner (alternating between data collection and analysis). Furthermore, I wanted to prioritize conceptual fit over ease of access (e.g. convenience sampling) and data depth rather than maximum variation with a dispersed focus. I therefore contacted several companies, presenting my research project, and went on to discuss possible projects providing the necessary setting in which I could observe the formation of self-reinforcing mechanisms. A family-owned logistics and storage company anonymized as 'LSC' provided that kind of research setting, as it was undergoing a company-wide transformation, initiated by a newly appointed CEO. This moment of disruption provided a rare window to observe how established patterns were questioned and new, potentially path-forming practices began to take shape. The organizational boundary of the case was defined as the formal entity of LSC, including all divisions and corporate functions involved in the transformation.

For the data collection within the organization, participants were selected purposively and via controlled snowballing, guided by principles of theoretical sampling according to their relevance for the research focus. This ensured that those most involved in shaping or experiencing the key practices were included. In parallel, I remained open to new leads as they emerged, allowing flexibility to follow relevant developments. Controlled snowballing was used to identify additional participants whose perspectives proved critical. In total, the empirical corpus consisted of twenty semi-

structured interviews (approximately 18 hours of recorded material), more than fifty informal conversations, and twenty-one meetings and workshops observed over roughly 90 hours of field presence. Additionally, 550 pages of internal reports, presentations, meeting minutes, and strategy documents spanning 2018–2024 were collected. These materials were complemented by extensive non-participant observation during leadership meetings, conferences, and daily operations on the floor. My data collection continued until conceptual saturation was reached, meaning no substantially new themes emerged during later interviews. Saturation could thus be assessed across all data types – interviews, observations, and documents – as later instances increasingly confirmed my existing categories rather than expanding them, indicating analytical convergence across sources. This multi-source approach supported triangulation and helped capture both formal processes and informal dynamics. My fieldwork itself consisted of a single meeting day in July 2024 plus a three-month timespan (mid-September – mid-December 2024), which involved daily presence at the site. While the immersive fieldwork spanned three months (plus one scoping day), longitudinal depth was enhanced through extensive archival data and ongoing iterative analysis during the fieldwork, allowing the reconstruction of prior developments and temporal linkages beyond the immediate observation window. This prolonged engagement allowed me to build rapport, observe evolving practices in real time, and understand how participants made sense of the transformation. Beyond formal settings, I witnessed spontaneous interactions and emotional reactions, which offered valuable insights into the lived experience of change.

For the subsequent data analysis, I combined temporal bracketing (Langley, 1999) with Gioia coding procedures (Gioia et al., 2013). Temporal bracketing organized the data into analytically meaningful time periods, while the Gioia approach ensured that concepts and themes remained grounded in the data through iterative coding. Using these complementary

strategies, I examined practices across the observable phases of path dependence (Sydow et al., 2009) to identify when and how mechanisms gained or lost momentum, became institutionalized, or were challenged. Together, these procedures formed the analytical backbone of the study. By linking bundles of situated practices to the four self-reinforcing mechanisms through pattern matching – for example, recurring coordination routines indicating coordination effects – the analysis traced how specific practices instantiated, amplified, or disrupted the mechanisms over time. Building on this foundation, the findings illuminate how reinforcing dynamics evolve and interact over time. Taken together, these methodological choices provided a coherent framework for studying how organizational practices become self-reinforcing or disruptive within a transforming environment. Variation across departments and hierarchical levels enriched the case and enhanced the analytical generalizability of the findings.

To ensure rigor, I documented every stage of the process, from design to final analysis. I wrote analytic memos, kept reflexive journals, and regularly discussed interim findings with my doctoral advisor to challenge assumptions and refine interpretations. Interview guidelines were only slightly adapted as themes emerged, maintaining comparability while allowing the exploration of relevant new angles. My field role was intentionally non-interventionist; I neither advised nor facilitated organizational change, minimizing my influence on the phenomena under study. Reflexivity was therefore maintained throughout by examining how my position might shape access, perception, and interpretation. Triangulation across interviews, observations, and documents, combined with supervisory feedback and peer debriefing, strengthened the credibility and dependability of the results. This combination of rigor, reflexivity, and methodological triangulation ensured that the analysis captured both the structural and the lived dimensions of organizational path dependence.

### III.2 Research Setting

Building on the theoretical rationale outlined in the previous section, the empirical investigation was conducted within LSC, a multinational logistics company that provided a revealing context for studying how deeply institutionalized practices are challenged and reconfigured during strategic transformation. Following Sydow et al. (2009), the company can be positioned in Phase 1 and the early stage of Phase 2 of path dependence – marked by the initial formation and gradual development of self-reinforcing mechanisms. This stage is particularly well suited to observing how such mechanisms begin to take shape within practice and how early patterns of persistence emerge.

LSC was selected as a revelatory case because it embodies both the persistence and the nascent reconfiguration of self-reinforcing mechanisms – a duality that lies at the heart of path dependence in practice. The company's long-standing divisional fragmentation, its conservative governance model, and the launch of an ambitious integration initiative created a fertile empirical foundation to observe how stability and change coexist in everyday organizational life. The decision to choose this setting, therefore, was not based on representativeness but on theoretical fit: LSC's trajectory exemplifies how routines and identities become visible and questioned when they are confronted while attempting to implement cross-divisional collaboration. Therefore, the temporal proximity of the fieldwork to such a major organizational transformation offered the opportunity to study the emergence of self-reinforcing mechanisms within the path dependence process through practices in real time.

Today, LSC operates in more than thirty countries and employs roughly 7,000 people. The company specializes in the transport and storage of high-sensitivity goods while also producing regulated food products. Its historical evolution from a regional shipping provider to a diversified global logistics

player illustrates a gradual layering of competencies and routines. Over the decades, the firm has expanded into adjacent activities – storage, intermodal handling, and food production – creating four independent divisions under one corporate umbrella. Across all these divisions, LSC has positioned itself in capital-intensive niches with strict compliance requirements, which has fostered a culture of reliability, caution, and operational discipline. These attributes, together with conservative financial management, have shaped a distinct organizational identity that continues to inform the way that new initiatives are interpreted and enacted.

Although the divisions operate under a shared corporate framework, each manages its own budget, customer portfolio, and key performance indicators. Corporate functions such as finance, HR, and IT serve as support entities but rarely intervene in divisional decisions. This configuration has cultivated strong internal identities and local optimization while discouraging cross-divisional collaboration. Differences in incentive systems, pricing logics, and reporting structures have continued to reinforce these silos. As a result, approximately 70 percent of LSC's customers have interacted with more than one division, yet these relationships have been handled separately. This fragmentation has led to redundant efforts, inconsistent customer experiences, and untapped synergies. Over time, these interlocking practices have solidified into a self-reinforcing pattern that stabilized divisional autonomy as both an efficiency logic and a taken-for-granted organizational norm.

As the logistics sector evolved, LSC increasingly faced new market and technological challenges. Customers demanded integrated, end-to-end solutions, while digital entrants and platform providers redefined value-creation logics. Internally, siloed routines and limited data sharing constrained responsiveness and innovation. The tension between external pressure for integration and internal adherence to established structures revealed the limits of incremental adjustment. In response, the board

appointed the first external CEO in the company's history – a symbolic act that signified readiness for deeper change.

The CEO began his tenure with a company-wide “Listening Campaign” engaging employees across all hierarchical levels and regions. The campaign revealed both pride in LSC's long-standing achievements and frustration with cross-divisional fragmentation. These insights culminated in the launch of the Corporate Excellence Strategy, a transformation program comprising five strategic initiatives: Talent and Performance, Sustainability, Digitalization, Customer Success, and the Blend Initiative (BI). Among them, the BI was distinctive in its explicit aim to dismantle divisional boundaries and develop integrated service offers for customers. Previous integration attempts had failed and left organizational skepticism in their wake. Consequently, the BI became not only a structural experiment but also a cultural test of whether the organization could transcend its deeply rooted routines and identities. Thus, it served as the empirical focal point of this study – a setting that visualized how stability and change are interwoven through practice.

At the time of my fieldwork, the transformation efforts coincided with the relocation of LSC's headquarters to a newly built open-plan office in Rotterdam. The move from enclosed offices to flexible, shared spaces symbolized a deliberate break from the past and materialized the company's ambition to modernize collaboration. The new environment encouraged more spontaneous exchanges and greater visibility across hierarchical and divisional boundaries but also created new distractions and coordination challenges. Rather than analyzing these material arrangements in depth, this section treats them as a contextual element that shaped interaction patterns during the observation period. The theoretical discussion and empirical analysis focus instead on how specific bundles of practices gave rise to emerging self-reinforcing mechanisms, how these mechanisms

developed their own internal logic, and which practices contributed to their formation, stabilization, or disruption.

Access to the field was facilitated through direct sponsorship by the CEO, who regarded the research as part of a broader effort to foster reflective learning during the transformation. This privileged access enabled participation in meetings and workshops usually closed to external observers, including top-management sessions and initiative-specific working discussions. A confidentiality agreement defined the scope of observation and ensured the protection of sensitive information. Within the field, my role was primarily observational. I refrained from intervening in discussions except when clarifying research objectives or responding to direct inquiries. This position allowed me close proximity to decision-making processes while maintaining analytical distance. Throughout the fieldwork I remained aware that such privileged access might shape both the openness of participants and the visibility of certain practices; reflexive notes were therefore used to account for potential bias and positional effects.

The fieldwork was conducted between mid-September and mid-December 2024, covering the later stages of strategy formulation and the early phase of implementation. Although the period was comparatively short, it was complemented by the analysis of archival documents and internal communications, providing sufficient temporal depth to identify emergent patterns. Data collection combined multiple sources to ensure triangulation: observations of executive meetings, initiative workshops, and informal exchanges; company artefacts such as presentation decks, workshop posters, and intranet communications, and secondary materials including internal newsletters and transformation reports. These diverse sources illuminated both the formal and informal dynamics of organizing and enabled a fine-grained understanding of how actors made sense of emerging structures.

While the broader transformation program remained visible across the organization, the empirical focus centered on the Blend Initiative, which represented a microcosm of the overall change effort. Concentrating on this initiative enabled detailed observation of coordination routines, accountability negotiations, and identity work across divisions without losing sight of the overarching strategic context. Throughout the fieldwork, recurring behavioral patterns – punctuality, formal communication, and disciplined execution – reflected the company’s enduring ethos of order and control. These routines exemplified the way that long-standing norms of reliability simultaneously enabled efficiency and constrained experimentation.

Overall, the LSC case provided an analytically fertile setting characterized by the coexistence of deeply institutionalized practices and deliberate efforts at renewal. The intersection of structural fragmentation, cultural discipline, and early transformation offered a unique opportunity to trace how self-reinforcing mechanisms emerge, evolve, and begin to solidify through everyday practice.

### **III.3 Data Collection**

Building on the research design and research setting outlined above, the following section provides a transparent account of how the empirical data was systematically collected to ensure credibility and methodological rigor (Gioia et al., 2013; Yin, 2016). The data collection was not a linear procedure but an ongoing, iterative process of adjustment between field engagement, data gathering, and preliminary analysis. Early impressions guided later inquiries, new observations often required the rethinking of initial assumptions, and emerging insights led to the exploration of new leads. In other words, the iterative interplay between observations, interviews, and

archival material continuously refined my understanding and pointed me towards aspects that warranted deeper exploration.

This iterative process of data collection and reflection (Yin, 2016) became the backbone of the research until a saturation point was reached, characterized by increasing confirmation of existing insights rather than the emergence of new themes. To enhance the credibility of the findings, data triangulation was applied by combining multiple sources – interviews, observations, and archival material – thus allowing me to capture both formal accounts and everyday practices of the transformation.

Throughout the fieldwork, regular discussions with my supervisor served as an external sounding board, providing methodological reflection and guidance on where to deepen or adjust data collection. As mentioned above, empirical data was gathered in the form of semi-structured interviews, non-participative observations, and archival material, which are summarized in Table 4.

Data Source	Scope & Description	Duration/ Amount	Purpose for Triangulation
<b>Semi-structured Interviews</b>	Employees from all hierarchical levels (strategic, middle, operational) involved in the transformation initiatives	20 interviews 30–60 min each Σ 42:12h	Explore individual sensemaking and perceptions of change
<b>Non-participative Observations</b>	Meetings, workshops, and	41 meetings 1 conference	Capture real-time practices

	daily interactions	65 observation days Σ 53:45h	and behavioral dynamics
<b>Informal Conversations</b>	Spontaneous and scheduled talks (coffee/lunch)	~ 50 conversations 5 – 45 minutes (Ø 15 minutes) Σ 12:30h	Complement formal data with
<b>Archival Data</b>	Strategy decks, reports, intranet communication, newsletters	~ 550 pages	Provide historical and organizational context; validate emerging patterns

**Table 4** Overview of the collected empirical data (Own illustration)

The semi-structured interviews provided in-depth insights into how actors perceived and made sense of the ongoing transformation. Each conversation offered a distinct perspective: some reflected on the organization’s culture and historical trajectories of escalation and adaptation, while others revealed the immediate challenges of steering and executing the initiatives, the practices underpinning these efforts, and perceived barriers or missing elements to implementing the transformation work.

Therefore, participants were selected purposively and via a controlled snowball approach, guided by the principles of theoretical sampling. Participants were progressively added until the emerging categories were sufficiently rich and additional interviews confirmed rather than extended the insights, indicating theoretical saturation (Glaser & Strauss, 1967). The

sampling therefore followed the principle of theoretical relevance rather than representativeness (Eisenhardt, 1989; Yin, 2016).

Initial interviewees were employees actively involved in or affected by one of the horizontal initiatives, providing first-hand insights into the day-to-day enactment of the transformation. As trust in my role grew, and due to the overall supportive culture within LSC, senior colleagues directly or indirectly responsible for shaping the transformation confirmed their participation and suggested further potential interview partners, who could provide appropriate insights on certain aspects. This gradual extension helped to enrich the sample, resulting in a broad, yet coherent picture of how different activities and practices were intertwined in order to develop self-reinforcing mechanisms.

In total, 20 interviews were conducted, between 30 to 60 minutes each, and covering a broad range of hierarchical levels and functions. The interviews were semi-structured to ensure comparability across participants while allowing flexibility for exploration and reflection (Yin, 2016). All interviews were conducted in English and took place either on-site or via secure video calls. Each conversation was recorded with informed consent, transcribed verbatim, and thereafter anonymized. The anonymization key was stored separately on an encrypted device to ensure confidentiality. The respective interview guideline was gradually adapted in line with the deepening understanding of the field. While the core topics – key practices and processes, perceived barriers and opportunities, and the dynamics of individual initiatives – remained stable, new prompts were added as theoretical insights evolved. The open-ended structure often led to reflective dialogues rather than rigid question–answer sequences, enabling participants to articulate experiences in their own terms. An overview of all the interviews is provided in Table 5.

Name	Department	Management Level	Interview Modality
<b>ERI</b>	Corporate_Business Development	Senior Employee	Digital
<b>LIS</b>	Division 4_Project Management	Employee	Digital
<b>BAL</b>	Corporate_Project Management	Employee	F2F
<b>HEN</b>	Division 1_Transformation	Senior Employee	F2F
<b>BUN</b>	Division 1_Transformation	Employee	F2F
<b>RON</b>	Corporate_HR	Employee	F2F
<b>LUK</b>	Corporate_HR	Middle Management	F2F
<b>JAJ</b>	Division 2_Business Development	Senior Employee	F2F
<b>MOR</b>	Corporate_Business Development	Top Management	Digital
<b>GOR</b>	Division 4_Strategy	Top Management	Digital
<b>KIM</b>	Division 1_Technologies and Innovation	Middle Management	F2F
<b>DEA</b>	Division 2_Technologies and Processes	Middle Management	F2F
<b>ALE</b>	Corporate_HR	Senior Employee	F2F
<b>IRM</b>	Corporate_Business Development	Middle Management	Digital
<b>CAR</b>	Corporate_Finance	Middle Management	Digital

<b>ELA</b>	Division 1_Transformation Team	Senior Employee	F2F
<b>ADR</b>	Blend Initiative	Middle Management	Digital/F2F
<b>CHA</b>	Corporate_HR	Employee	F2F
<b>IVA</b>	Division 3_Finance	Middle Management	Digital

**Table 5** Overview interviewed participants (Own illustration)

In parallel to the interviews, I continuously observed the everyday work environment across recurring meetings, internal conferences, and informal office interactions such as lunch breaks or coffee-machine conversations. The aim of these non-participative observations was to capture practices as they unfolded in real-time and to complement the interview data with behavioral and interactional nuances (Yin, 2016). My attention was directed not only to what was said, but also to behavioral aspects like gestures, timing of decisions, modes of feedback, and embodied signals of agreement or hesitation.

To minimize researcher influence, I deliberately maintained a non-interventionist stance, refraining from joining transformation discussions or offering opinions on ongoing matters. Additionally, as familiarity and trust within the field increased, the uncertainty about my presence faded and the interactions around me followed their natural rhythm. This enabled me to observe authentic moments of collaboration, resistance, and adaptation. With the reduction of uncertainty, the number of informal conversations increased over time and provided meaningful insight into how employees felt about new processes, shifting responsibilities, and emerging frictions – offering a new lens on how the transformation was being executed, and perceived. Some of these exchanges were short and spontaneous, while others took the form of extended one-on-one conversations, often ‘over

*coffee*'. These informal encounters provided an additional layer of understanding and helped to contextualize the formally observed practices, capturing the emotional tone and lived experience of the transformation.

To ensure accuracy and reflexivity, I kept detailed handwritten notes throughout each day, which were digitalized and reflected upon each evening. This ongoing documentation served both as a record and as an analytic tool to connect observations with emerging themes from the interviews. Observational data thus formed a central pillar of the overall data triangulation, helping to cross-check, enrich, and add nuance to the verbal accounts of transformation practices. In addition to the interviews and observations, I continuously gathered a wide range of archival material, including historical strategy decks, culture assessments, external announcements, ongoing project overviews, internal reports, social media updates, and future organizational plans. Collecting these documents served two complementary purposes: first, to triangulate the interview and observational data, and second, to reconstruct the historical trajectory of the transformation (Yin, 2016).

The archival material provided a valuable external lens on how practices, priorities, and narratives were formally framed and communicated – sometimes in contrast to what was enacted in day-to-day work. Additionally, documents created before the start of my fieldwork offered particular insights, as they enabled me to retrace key decisions, identify shifts in strategic emphasis, and situate current practices within a longer organizational trajectory.

Through the direct sponsorship by the CEO, and the supportive culture within LSC, I was rarely restricted, which allowed me unusually broad data access. Nonetheless, I remained aware that such documents reflect organizational perspectives and may emphasize particular interpretations of success or progress. To account for this, I compared formal narratives with observations and interview insights, thereby mitigating potential bias and

enhancing validity through data triangulation. Finally, the collected data was prepared, revised and systematically catalogued according to source, date, and content type.

Taken together, the combination of semi-structured interviews, non-participative observations, and archival material provided a comprehensive and multi-layered empirical foundation for examining the transformation in practice. The iterative nature of the fieldwork – moving continuously between data collection, reflection, and early interpretation – enabled a deep engagement with the dynamics at play and ensured that emerging insights were grounded in multiple, triangulated sources of evidence. In preparation for the subsequent analysis, the complete body of data was systematically organized and integrated into MAXQDA, which served as the central platform for the analytical procedures described in Chapter III.4. This chapter outlines how the Gioia methodology and temporal bracketing were applied in concert to develop first- and second-order codes, trace mechanism dynamics across temporal phases, and translate empirical observations into the theoretical data structure presented in the findings.

### **III.4 Data Analysis**

Before I began analyzing the development of the new cross-collaborative path, I first had to examine if an actual path and its specific constellation is existing. Through a retrospective analysis based on archival and interview data, it became clear that a defined pattern of stabilized routines and structures was shaping the non-collaborative work between the divisions over many years: responsibilities of budgets and business results were strictly allocated to the individual divisions, which was also reflected within target agreements. Furthermore, there were no legal documents or IT systems connecting the single division, which meant there was no common

customer database and each division developed and used its own instruments and tools. This institutionalized silo mentality was further reinforced by the experience of a previous failed collaboration initiative, which fueled the belief that cross-divisional cooperation was impossible and would not make sense. This resulted in an organisational logic that had become entrenched over many years, which was self-reinforcing through coordination, complementarity, learning and expectation effects, thus forming the starting point for the subsequent transformation.

The data analysis, which aimed to answer the research question, followed the same iterative logic as the data collection and was therefore conducted partly in parallel. Already during the observation period, first recurring patterns and ideas emerged that shaped where I directed my attention in the field. This continuous interplay between collecting, reflecting, and interpreting became an integral part of the analytical process and deepened my understanding of how the transformation unfolded over time. Because of this simultaneous approach, the study generated a substantial amount of material. To organize it systematically, all transcripts, field notes, and archival documents were labeled with basic descriptors such as participant role, initiative, and date and then imported into MAXQDA. During this structuring process, I wrote short notes to capture first impressions, inconsistencies, or questions. These annotations helped retain nuances and impressions of the field's atmosphere that might otherwise have been lost in later, more abstract stages of the analysis.

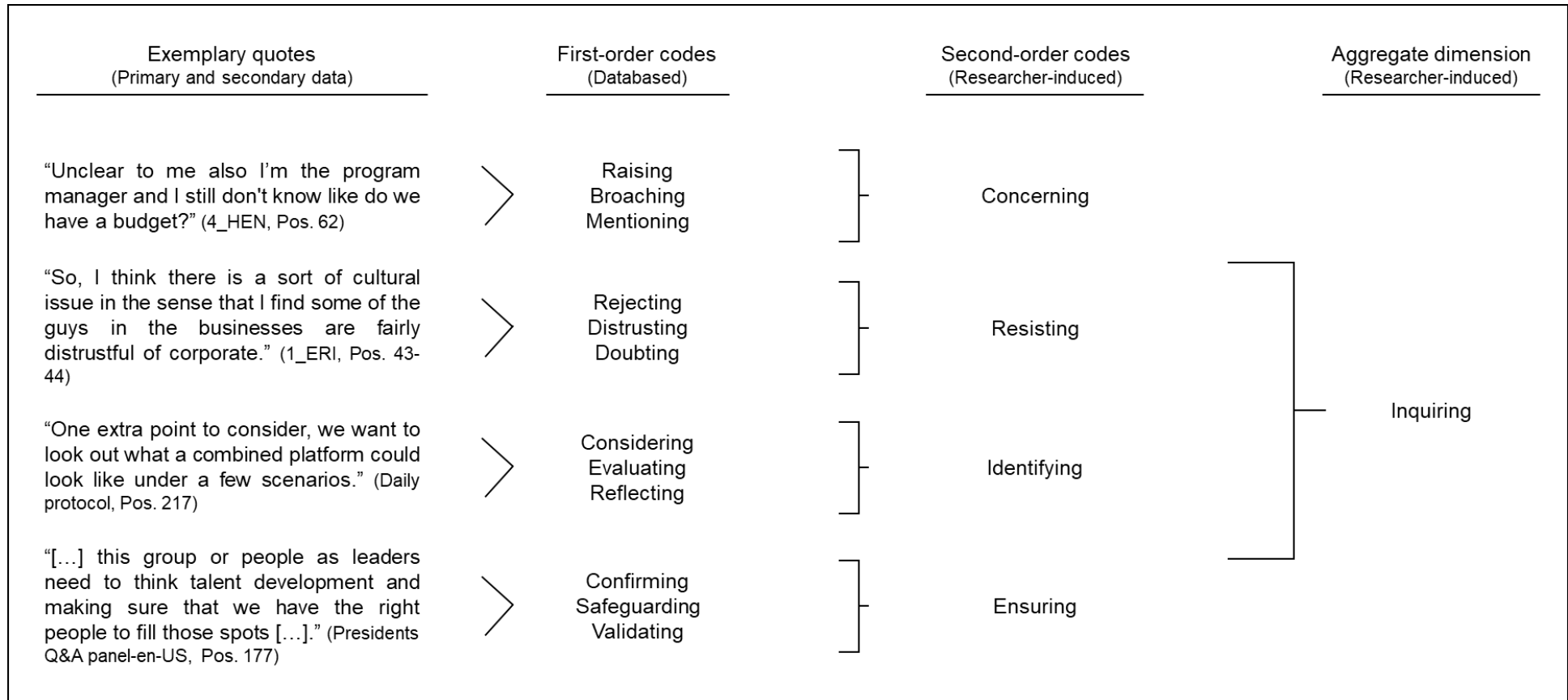
The coding process began with the first-order analysis described by Gioia et al. (2013), during which I aimed to stay as close as possible to the actors' own language in order to capture what happened in the field without imposing predefined theoretical categories. To preserve the participants' wording and meanings, I used *in vivo* codes that recorded concrete actions or statements such as "*It's all about co-creation*" (TMT Meeting 1024, Pos. 44) or "*They're open to change, but they want to do it themselves – at their*

*pace, with their people*" (15\_IRM, Pos. 115). Observation notes were coded in the same way, for example when meetings ended without clear decisions or when "doings" and "sayings" diverged, leading to repeated and only partially reflected work cycles. This initial phase of coding resulted in around 900 first-order codes and remained deliberately descriptive, aiming to document how transformation practices unfolded and how they were articulated, before moving toward any higher-level abstraction.

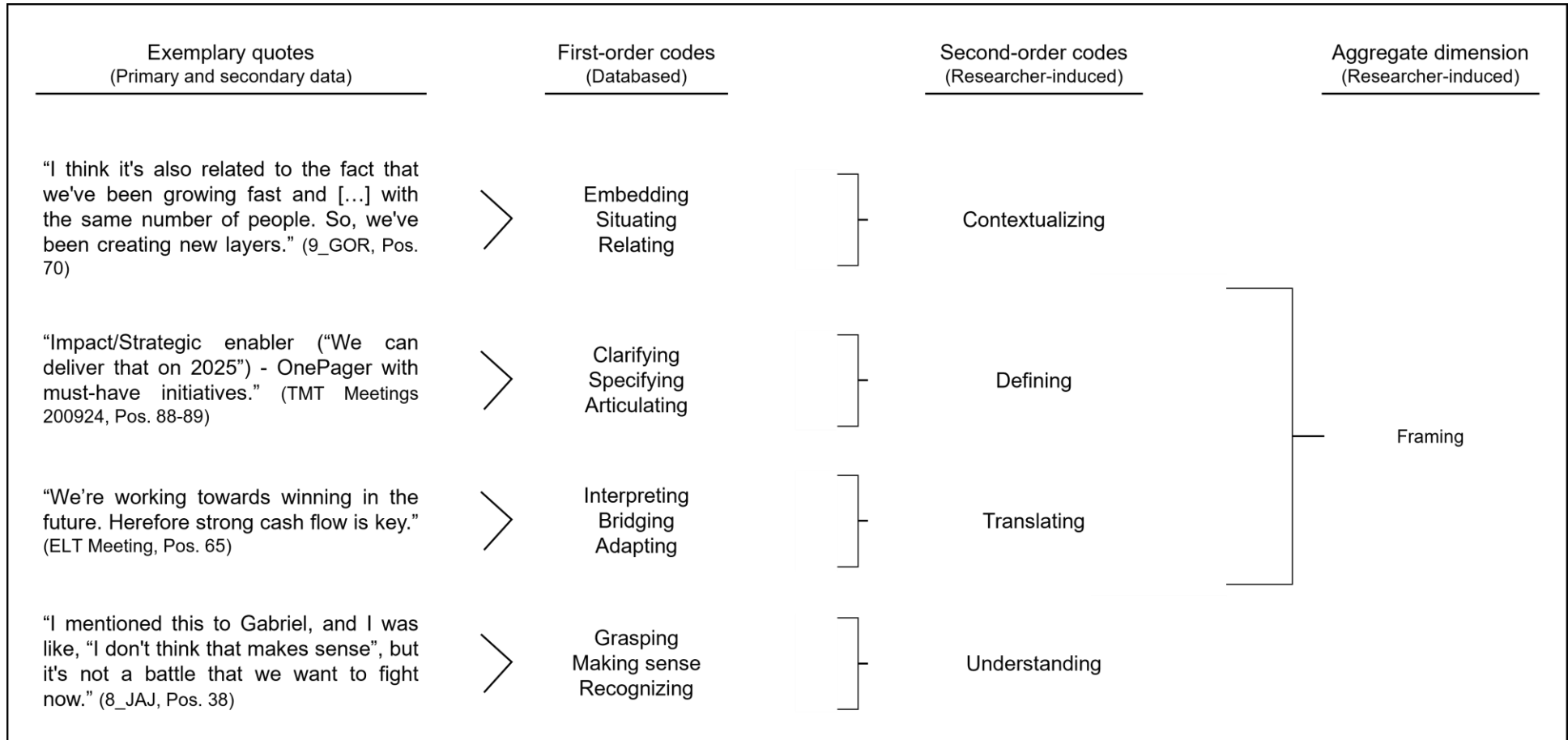
As the analysis progressed, I began to compare the emerging codes from interviews, observations, and archival documents. In doing so, I gradually built clusters of codes that shared a similar meaning or captured related aspects of organizing. For instance, codes such as "*At the same time, we need the cultural transformation where we really focus*" (9\_GOR, Pos. 46) and "*It raised a lot of alarm bells for us because we thought we had our strategy for the year*" (16\_ELA, Pos. 76) were grouped into a concern cluster, whereas statements like "*I knew it was like we were going to figure it out together*" (3\_BAL, Pos. 55) were associated with a learning cluster. These clusters represented the second-order level of analysis – resulting in twenty 2nd-order codes – and reflected a higher degree of interpretation. I continuously compared categories against earlier data to ensure that they remained grounded in the empirical material rather than in my assumptions – a process consistent with the constant comparison method (Glaser & Strauss, 1967). Some clusters were restructured over time by splitting, merging, or discarding them as new insights emerged, even in later stages of writing when I initially considered the analysis complete. This iterative refinement was crucial to keep the categories anchored in the observed practices while acknowledging that complete neutrality is neither possible nor desirable in interpretive qualitative research.

As the analysis progressed, the previously identified twenty second-order codes were repeatedly reviewed, discussed, and refined through several iterative loops. These categories already indicated recognizable patterns of

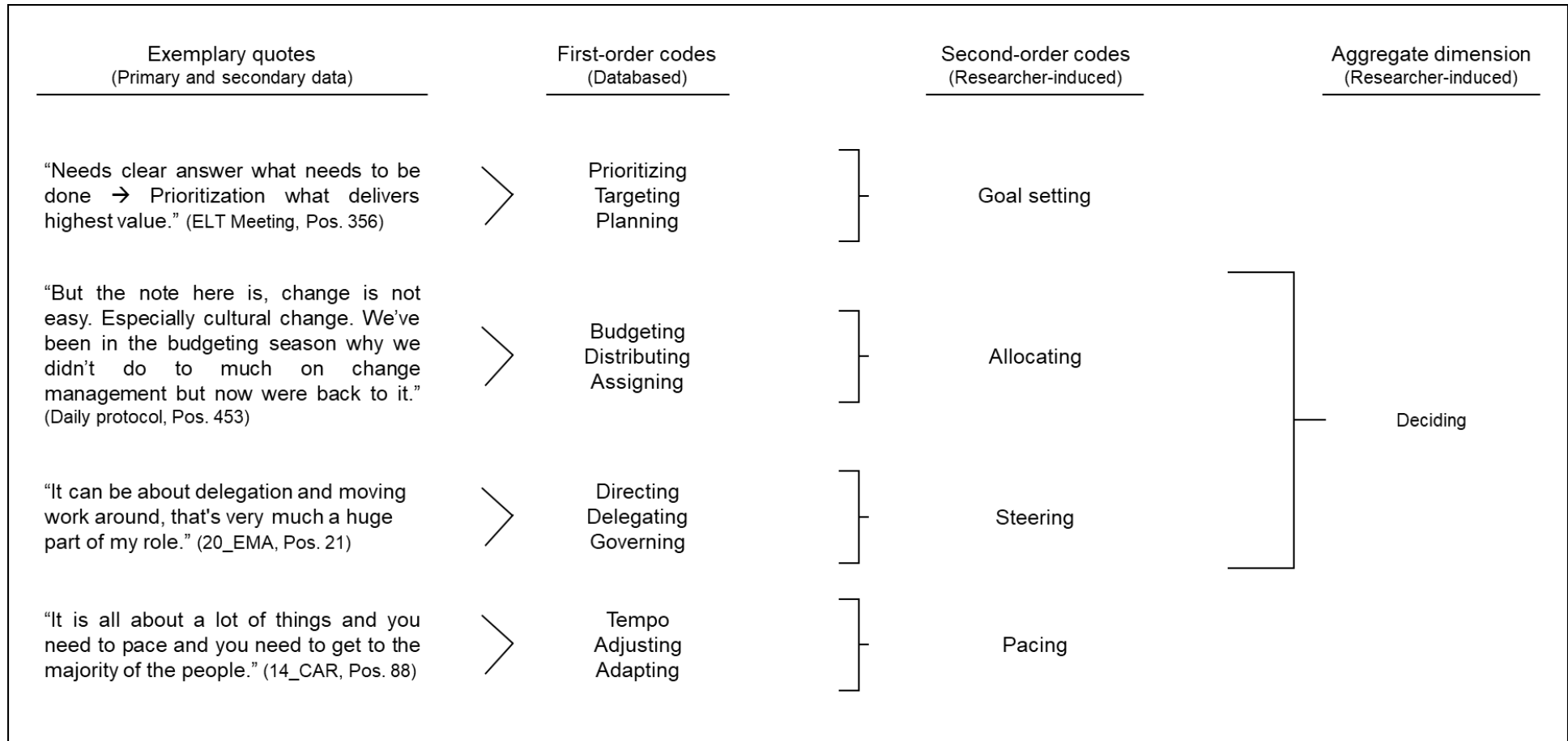
action that occasionally overlapped or complemented one another. Through this ongoing reflection and refinement, the twenty clusters were first condensed into eight overarching practices that captured the main forms of organizing and interaction within the transformation. Over time – including during the later stages of writing – the entire coding structure was revisited and systematically compared with the empirical material. This final step revealed partial overlaps and redundancies between some practices, which led to a further consolidation into six empirically grounded practices. These six third-order dimensions represent the key patterns of practice through which actors simultaneously produce stability and change throughout the evolving path process. The emerging data structures are depicted in the following Figures 2 - 7.



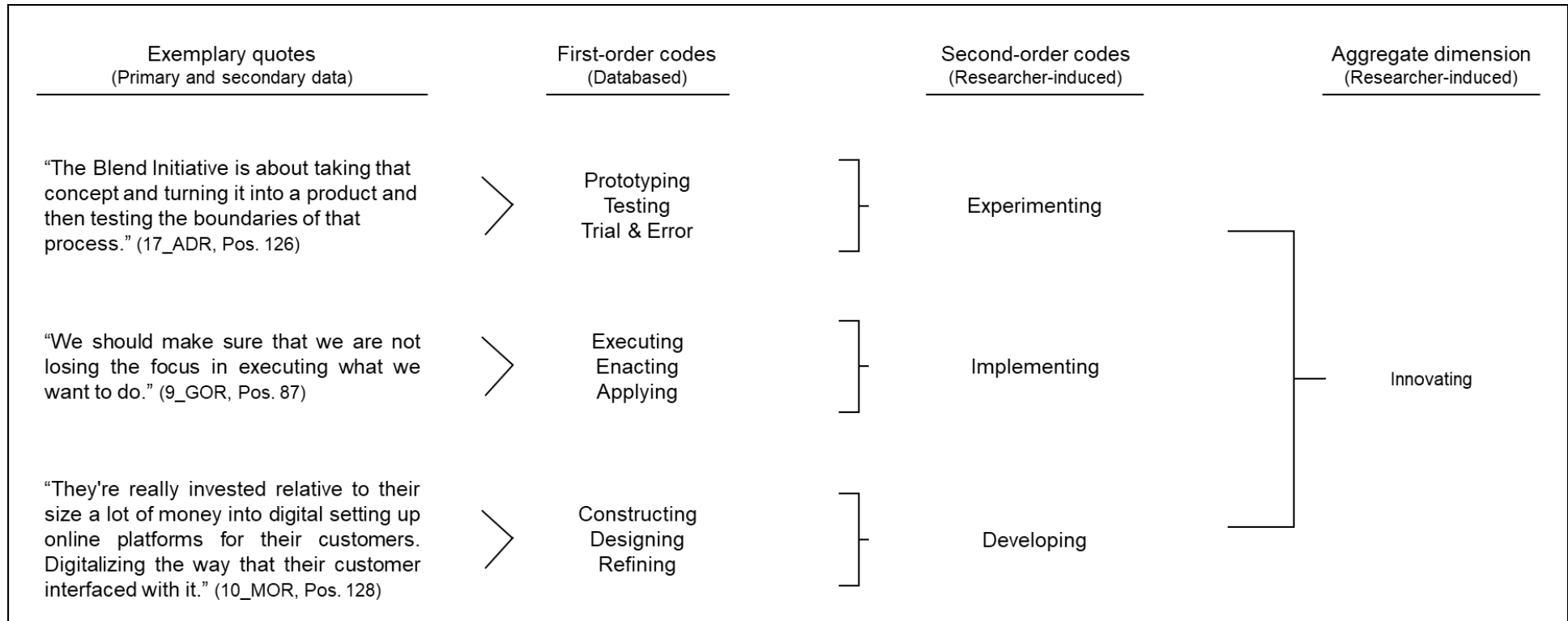
**Figure 2** Emergent data structure – Inquiring (Own illustration)



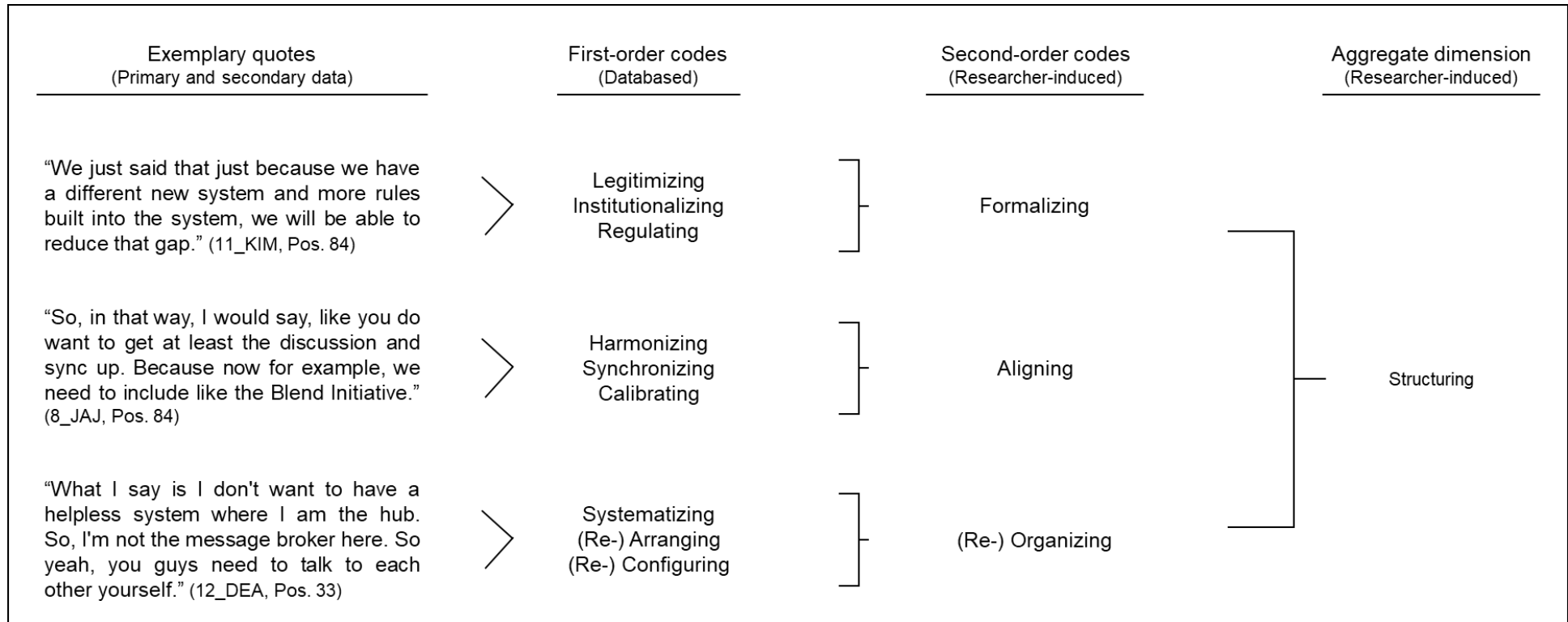
**Figure 3** Emergent data structure – Framing (Own illustration)



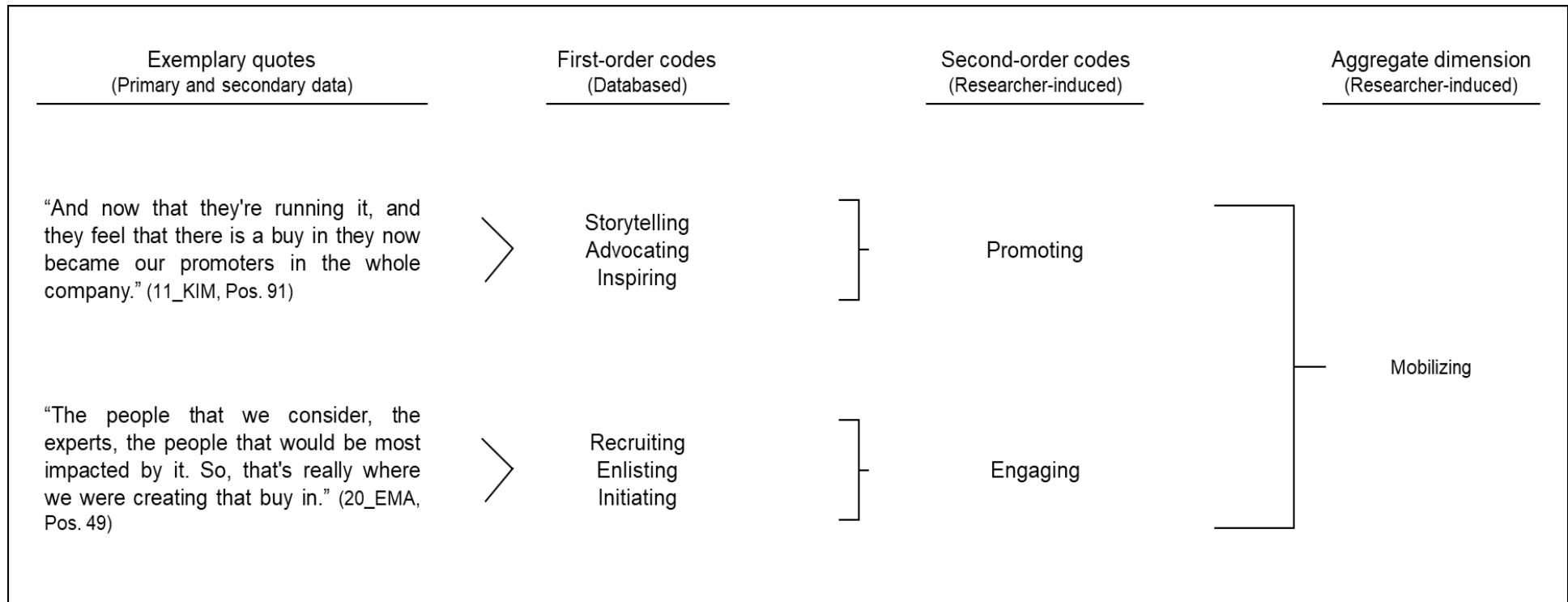
**Figure 4** Emergent data structure – Deciding (Own illustration)



**Figure 5** Emergent data structure – Innovating (Own illustration)



**Figure 6** Emergent data structure – Structuring (Own illustration)



**Figure 7** Emergent data structure – Mobilizing (Own illustration)

Up to the identification of the six practices, the analysis was largely inductive. In the subsequent step, these practices were deductively linked to the theoretical concepts of the four self-reinforcing mechanisms (Sydow et al., 2009) through a practice-mechanism-matching procedure (Yin, 2016). This connected the empirical findings to the established framework of path dependence and was grounded in the empirical chronology of the transformation and the gradual emergence of the mechanisms. The mapping was therefore not a retrospective theoretical classification but based on the reconstructed sequence of events and dense empirical descriptions, ensuring that the theoretical abstraction remained closely tied to observed practice. The analysis revealed that recurring meetings, standardized tools, learning and feedback loops, and forms of collective sensemaking did not reflect single mechanisms in isolation but, in combination, produced specific self-reinforcing dynamics. Table 6 depicts the matching, distinguishing the practices by their primary and dominant (1) and secondary, indirect (2) presence in building the SRM.

	Adaptive Expectations Mechanism	Coordination Mechanism	Learning Mechanism	Complementarity Mechanism
<b>Inquiring</b>	1	1	1	1
<b>Framing</b>	1	1	1	1
<b>Mobilizing</b>	1	2	2	2
<b>Innovating</b>	2	1	1	2
<b>Deciding</b>	2	1	2	2
<b>Structuring</b>	2	2	2	1

**Table 6 Practice-Mechanism-Matching (Own illustration)**

To trace how the self-reinforcing mechanisms unfolded over time, I complemented the analysis with a processual perspective following Langley's (1999) approach to temporal bracketing. This step made it possible to segment the transformation into three analytically distinct phases, each separated by critical junctures that marked shifts in the overall trajectory. The first phase was characterized by mobilization and the initial communication of new initiatives, including the assignment of volunteer employees and the introduction of new guidelines by the incoming CEO. This period was marked by a sense of "chaotic euphoria" as enthusiasm and uncertainty coincided. The second phase showed the first signs of a stabilizing rhythm in the emerging sequence of practices, while at the same time growing fatigue and skepticism became apparent among participants. In the third phase, new routines of coordination and communication had become more defined and institutionalized, and the general attitude toward the transformation improved again as first visible results appeared. Across these three phases, the temporal segmentation helped to reconstruct how the self-reinforcing mechanisms evolved, which practices dominated at different points in time, how they interacted, and how earlier patterns were gradually weakened, reinterpreted, or transformed into new configurations. In addition to this temporal analysis, the material was also analyzed structurally in order to understand how similar practices were enacted at different levels and in different initiatives. Therefore, it became clear how practices and thus also mechanisms within the organization 'migrated' and were enacted and interpreted differently.

The entire analysis process was coined by repeated reflection and critical feedback while new insights resulted in continuously adapting prior codes, cluster and practices. Thereby contradictions in the material were particularly valuable and revealing: for example although leadership promoted a new empowering culture, decision-making processes often remained centralized. These tensions were not understood as

inconsistencies, but rather as analytically relevant phenomena, because they illustrate how paths can reproduce and change simultaneously.

To validate the interpretations, interim results were continuously discussed with my supervisor and in research and doctoral colloquia. This feedback helped to question assumptions, refine classifications and critically reflect on theoretical links. At the same time, it served as a reminder that analysis is always an interpretative process that is shaped by one's own position in the field (Eisenhardt & Graebner, 2007). The combination of memos, iterative comparison, and feedback loops thus ensured methodological rigor and reflexivity throughout the entire analysis process.

## **IV RESULTS**

The following chapter presents the empirical findings. It begins with the contextual factors and drivers that shaped LSC's transformation, as these conditions formed the foundation for the observed developments and influenced both the emergence of the self-reinforcing mechanisms and the practices constituting them. Chapter IV.2 then reconstructs the chronological progression of the transformation in detail, before Chapter IV.3 introduces the six practices that serve as the analytical basis for explaining their unfolding logic. The chapter concludes with an examination of the mutual and cross-mechanism influences, which together illuminates the dynamic through which the emerging path took shape.

### **IV.1 Contextual Factors and Drivers of LSC's Transformation**

In order to adequately describe and understand the practices that constitute self-reinforcing mechanisms within LSC (Chapter IV.3), it is essential to first consider the contextual factors and drivers – such as culture, leadership, organizational structure, current and challenges. These elements act as antecedents that shape how subsequent practices emerge, unfold, and are enacted. This section therefore outlines the most relevant contextual influences and describes how they created the conditions under which the transformation took place.

A first defining element was the company's corporate culture, which appeared distinctive and immediately recognizable to outsiders. During my initial conversations while setting up this research, it became clear that three features dominated: a strong family orientation, a deeply rooted safety-first mindset, and an entrepreneurial spirit. The distinct character of this culture is best captured in the words of the former CEO, who described it as follows:

*“I think the part the culture is we are long term investors. The family definitely has a role in that culture. We're stubborn, sometimes too stubborn. We take care of our people. We look at them as an extended part of the family. We'd like to do it the right way - quality and long term. We make money by building something from the ground up. We are innovators, entrepreneurs, the entrepreneurial spirit, willing to try, willing to fail, but managing the balance sheet so that you do more right things than bad things [...]. It's following small procedures and policies [...]. It's this discipline that we built up. And policies and procedures, respect for each other, respect for different cultures. We've always had that people, authorities don't have to come and tell us how to do it [...]. It is something that takes the people in this company beyond just their salary and their paycheck. It is something that you feel that you belong to something special. I really believe that” (BLT 2024 Conference Fireside Chat with Simon and Oliver, Pos. 173-181).*

The family orientation manifested in a caring and protective collective ethos, creating a safe work environment and fostering loyalty.

*“LSC is a very nice company for people, so. I think it's in our culture also to say ‘Ok, we collaborate to success’ but also protect our teams, protect our people” (12\_DEA, Pos. 90).*

At the same time, this very culture also fostered a strong sense of commitment and mutual support: colleagues consistently offered help, meetings were never postponed, and the work environment was marked by trust rather than hidden rivalries.

*“But unless you've done something grossly incompetent, or you know, business technology for malpractices in essence, then, you know, people will support you in that. And that started off with for example Simon or Oliver supports you and says, “Ok, we made this decision together. You just were the spearhead of that, so we all stand beside you and that's fine.” So, that is the massive positive of that value” (10\_MOR, Pos. 58).*

This supportive environment also translated into high tenure, with many employees expressing pride in their long affiliation with the company – some having worked there for more than 30 years. Internal data showed an average tenure of nine years across the organization:

*“The average tenure here is incredibly high. I don't recall the exact number, but I spoke to Andrea about it once. I think it's something like nine years or something, which is which is very long. You know, there's many people have been here in the business for 30 plus years” (1\_ERI, Pos. 53).*

While tenure was a valuable resource that safeguarded tacit knowledge, it also strengthened rigid routines and identities. Employees often perceived changes in role allocation as a threat to their hard-earned expertise:

*“So, the feeling is that a lot of people perceive that to be where their value comes from in that they know that customer, they know this way of working. And actually, by introducing change and giving them that uneasy feeling that they're not the master of that domain anymore. They work the same way, with the same people for the last 10-15 years, whatever. And you're asking them to do, to make a change, that they seem as reducing their value to the organization. They're not*

*the go-to-people anymore, potentially for that topic. And deal and build up with that new process, with that new technology and new way of working. That's one of the difficult things with change that I find we have to deal with. The comfortability with not being the expert anymore on a certain topic” (20\_EMA, Pos. 79).*

Furthermore, the high tenure also shaped interpersonal dynamics, sometimes leading to hesitation to extend trust. Long-standing employees who had “*kept the ships from exploding*” for many years were careful in placing trust in new actors or initiatives. Earning their support required time, credibility, and visible proof of reliability.

*“And again, there's this new guy on the block who does not know what we do and the people who've been here for 25 years not blown a ship and I don't know whether what this guy's recommending is going to blow up a ship. So, I must make sure that you know, I take my time to trust this person before I start doing what they are asking me to do” (11\_KIM, Pos. 113).*

In parallel, the protective family ethos limited open feedback. Employees often avoided giving direct feedback, often leaving shortcomings unaddressed.

*“Maybe it's just me being, you know, from the country that I am and also relatively like confrontational, but I observe it more broadly as well [...]. But I believe that people don't necessarily call out bad performance as much because we don't want to - because it's just not the culture to do that. But sometimes things can be pretty rubbish and with the reluctance to really shine a light on that” (10\_MOR, Pos. 53).*

This lack of constructive criticism also contributed to what employees referred to as a 'keen-to-please' culture, in which individuals tried to meet everyone's expectations and consequently avoid delays or conflicts.

*"If things have to be delayed, delay them – "the culture is that nobody would tell you, that they can't do it or have to delay it. Everyone wants to please everyone, and nothing get properly done in the end" (Daily protocol, Pos. 300).*

Because feedback was rare, employees looked upwards for guidance. Over time, this created a top-down dynamic in which decisions were concentrated at the top, reducing opportunities for bottom-up input:

*"That's going to be our foundational pillar. And I don't know why people are - why my team members are not speaking up, yeah" (3\_BAL, Pos. 71).*

*"Well. You know, I think having a CEO as family member for a long time, you don't stand up to a CEO who owns the company. You don't say what you're saying is \*\*\*\*. You're just pleasing him. So, what that creates is a policing culture. From top down. So, I think we are not a company where we give each other enough feedback" (13\_ALE, Pos. 53).*

This tendency became even more visible in the company's second defining cultural trait: a deeply institutionalized safety-first mindset. Operating in a highly regulated sector, LSC built its identity around compliance and discipline. Employees were acutely aware of the risks involved in handling sensitive goods.

*“Because if you think about the businesses that has the safety culture. And safety is very important, because we are dealing with things that can blow up – literally. And so, it's scary and the ships are like, specifically have so many moving parts and you can injure yourself quite badly. So, there's a lot of regulations, obviously, that are coming externally towards, but also internally the procedures and processes” (5\_BUN, Pos. 71).*

*“And so why am I sharing these stories is we need to be able to look at every day into the mirror and ask ourselves, are we doing the best possible on safety? And are we really living safety first at any point in time?” (BLT 2024 Conference Fireside Chat with Simon and Oliver, Pos. 8).*

Closely linked to regulatory compliance, this orientation reflected the company's need to meet the numerous legal requirements characteristic of the logistics sector. However, LSC's commitment to safety extended far beyond simple adherence. By consistently exceeding mandatory standards, the company positioned itself not only as a reliable rule-follower but also as an active contributor to shaping broader industry norms and policies. Safety procedures were applied so rigorously that potential collaborations were sometimes declined when customer practices did not align – decisions that underlined the company's principles but occasionally meant foregoing commercial opportunities.

*“We made a clear decision that we're going to stop shipping this type of cargo except for a very specific group of customers that we are very comfortable that they have the same safety level, you know, culture that we have. So, basically if we can't be 100% sure that the*

*customer's treating it to the same level of priority as we are, we're not shipping it" (19\_IVA, Pos. 49).*

The third cultural pillar, the entrepreneurial spirit, created some tension with the company's strong safety orientation. Rooted in the belief that LSC had always "built things from the ground up," it fostered a mindset of initiative, innovation, and calculated risk-taking.

*"So again, you are trying to be ahead of curve you are trying to innovate, you're trying to figure out stuff that nobody else is doing. You're not really looking at food x, for example, which is majority of what you know, most of the other farms look at. So, I think it's an innovative way of working" (11\_KIM, Pos. 128).*

*"Our company is built on innovation. Both incremental and transformational innovation. Not everything worked, but we always tried and we always learned. We cannot stumble onto the next big idea unless we keep moving forward" (LSC Culture, Pos. 23).*

At the same time, this mindset translated into pragmatism and resistance to bureaucracy. Employees often relied on ad-hoc solutions and quick decisions rather than formalized procedures, favoring speed and flexibility over standardized routines.

*"So, our values are, I mean our DNA, which is also embedded in the values which stimulates sometimes, is that we sometimes are over pragmatic. So, we think we can just do it without considering change - considering I mean - some companies you know have or they feel for us very bureaucratic. And this is complete waterfall you guys are*

*doing too much preparation work. Why adding all those consultants? Why doing this change?” (12\_DEA, Pos. 128).*

*“I think they do things more ad hoc. So, it wasn't that they were not having those conversations, but it was more a case of the structure around. It seemed something that was definitely not needed because in an unstructured way we do it anyway” (16\_ELA, Pos. 37).*

As a result of this non-bureaucratic orientation, many processes were only partially standardized, and project management practices in particular evolved in a piecemeal rather than centralized manner. The lack of a dedicated Program Management Office (PMO) meant that coordination and oversight of the transformation was distributed across different actors. This reflected the company's entrepreneurial ethos, but at the same time increased the workload for those involved.

*“Actually it [the transformation program] needs an own PMO but that doesn't exist which is crazy” (Daily protocol, Pos. 265).*

*“With expectations to HR and IT all the other workstreams are being juggled on top of people's daily jobs” (Daily protocol, Pos. 46).*

Beyond these cultural aspects, the organizational structure also played a central role within LSC's transformation. Built on a distinct vertical logic, the divisions operated largely in silos, with only limited communication or collaboration across boundaries. The lack of cross-divisional dialogue reduced opportunities for shared learning and amplified inefficiencies in daily operations. These shortcomings became especially visible in customer interactions, where insufficient coordination sometimes led to conflicting

offers on price, timing, or service quality – ultimately eroding customer trust and organizational credibility.

*“Because we also leave money not serving and talking to each other within the business units. Example: A customer wanted to cargo some goods via Division 1. But they didn’t have the capacity and were charging for a later shipment XY Dollar / Unit shipped. Then the customer went to Division 3, and they offered quicker shipping within time and a price of XY-1 Dollar / Unit shipped. That was way cheaper and quicker. So that just doesn’t make sense. What learning and experience does the customer then have?” (Daily protocol, Pos. 788).*

Just as the absence of constructive feedback had been seen as problematic, a lack of role clarity surfaced as another major concern. Employees described situations in which responsibilities overlapped, tasks were duplicated, and accountability became blurred. This ambiguity was closely linked to the limited collaboration across departments and often resulted in inefficient workflows.

*“You know their own business development team, they've kind of done something like that where I don't remember when it was maybe six months ago or a year ago, they sent us a deck where they sort of defined their responsibilities and ownership over stuff versus what people and in corporate would do. But it was very; it was very strange to me because they sent that deck out without consulting us beforehand. So, you know, we get this presentation and it basically says what my job is going forward with this. To their projects and I just find it very confusing” (1\_ERI, Pos. 49).*

In addition, the vertical structure encouraged a strongly hierarchical, top-down style of management. Reflecting the cultural habit of seeking guidance from senior leaders, employees experienced limited autonomy and often depended on several layers of approval. Decision-making was frequently slowed down, as leaders became heavily involved in operational details, adding complexity and reducing flexibility.

*“You know, that’s where the stress comes in a bit. Because you have to move quickly. I know that things are needed. Oliver says “push, push, push” - he doesn’t want to move slowly, and that’s fine. But the approval process that I need to go through doesn’t match the pace. So, it’s kind of stressful and in order to get the approvals I need time with those people. They don’t have the time” (7\_LUK, Pos. 57).*

Another contextual factor shaping the transformation was the company’s approach to resources and human capital. Over the years, a strong focus on cost discipline had become deeply ingrained in how the organization functioned. As one executive recalled:

*“Now at other times, I think there’s some tone at the top that has negative connotations because its very cost focused for a long time. You know, some of that is market driven. And then Simon seeing that the only way we’re going to be successful is if we don’t forget about our cost base” (19\_IVA, Pos. 99).*

This orientation became most visible in hiring practices. Former CEO Simon was known for his restrictive stance toward headcount, which translated into structural bottlenecks across departments:

*“Simon was obsessed about headcount. Doesn't want to prove more too many or if just your request. No, except if its business related and it brings money. So, you can't do anything” (18\_CHA, Pos. 88).*

In combination with the fact that industry-specific expertise could not easily be sourced externally, these practices created lasting vulnerabilities. Employees stressed the difficulty of quickly onboarding new staff in such a specialized environment:

*“And that's the challenge, especially in our industry. It takes time to skill these people up. So, we can't just bring in contractors or temporary staff. You have to be much smarter with how we do that” (20\_EMA, Pos. 21).*

The restrictive hiring practices did not only create general resource bottlenecks but also led to highly fragile dependencies on individual employees. In several instances, essential processes and responsibilities rested entirely on the shoulders of a single person, leaving the organization exposed to significant risks:

*“Finally, they really realized, especially the last two years, that it's really important to have a bigger plan. That's why that's something that we of course put it in the business case to get Emmanuel as an extra resource because there is no one else. If tomorrow I'm not here if I would quit or if something happened. Of course, I document, and I have documents and do dry runs and etc. to keep track of things that are obvious. But I cannot, there is stuff that I'm the only one who knows how they work” (18\_CHA, Pos. 134).*

These constraints placed increasing pressure on employees and, over time, began to affect their sense of psychological wellbeing. While the company's identity remained strongly rooted in operational safety, the growing workload shifted attention away from mental wellbeing. Employees spoke of mounting stress and even signs of burnout:

*“And I had weeks with them that week and one of the directors was telling me he's about to get a burnout, you know, like very bad. And then I called it out. No one backed me up” (Daily protocol, Pos. 836).*

This contrasted with the company's protective self-image, historically shaped by its family ethos:

*“LSC is a very nice company for people, so. I think it's in our culture also to say ‘Ok, we collaborate to success’ but also protect our teams, protect our people. And that's kind of strong feel. Are we really truly a performance driven company and we don't care whatever? So, what we are doing is of course - it's also some protectionism, but not only for my own stuff what's in my control, but also for my team. My team is doing great job. Why are you asking me to do something else top-down for my team?” (12\_DEA, Pos. 90).*

Closely connected to these pressures was the growing challenge of succession. Years of restrictive recruitment and limited investment in systematic employee development had made it increasingly difficult to build a sustainable pipeline of future leaders and specialists. Employees repeatedly pointed to a widening gap between the expertise needed to stay competitive and the skills currently available within the company. As a result, calls for more structured training, clearer development paths, and tangible

career opportunities became louder, reflecting a shared understanding that the existing approach would not ensure continuity in the years ahead:

*“We need to promote and sometimes hire from outside to sustain the business. At the moment there will be a clear gap between people needed and people existing. Development and Training will be necessary” (BLT Meeting, Pos. 26–29).*

These concerns were not limited to individual experiences. They also appeared in the company-wide Listening Campaign, which confirmed employees’ pride in LSC’s culture and market position but at the same time revealed inefficient workflows, limited development opportunities, and a lack of collaboration across divisions. The results, summarized in Table 7, pointed to a growing need for more training, stronger leadership support, and better knowledge-sharing between units.

Listening Campaign Questions	Key Themes from Employee Responses
<b>What makes you proud to work for LSC?</b>	<ul style="list-style-type: none"> <li>a. Industry Leader</li> <li>b. People / Culture</li> <li>c. Ethics</li> </ul>
<b>What more can the company do to make you and your team/colleagues more successful?</b>	<ul style="list-style-type: none"> <li>a. Training</li> <li>b. Better Management, Leadership and Support</li> <li>c. Salary increase</li> </ul>

<b>What can the company do to help make our customers more successful?</b>	<ul style="list-style-type: none"> <li>a. Listen/Feedback</li> <li>b. Quality</li> <li>c. Customer Experience</li> </ul>
<b>If you were the CEO, what would you do to make LSC more successful?</b>	<ul style="list-style-type: none"> <li>a. Benefits and recognition: “Recognize efforts and accomplishments of employees.”</li> <li>b. Investing in your workforce: “Invest in training and development to enhance skills, productivity and job satisfaction.”</li> <li>c. Strategy and innovation: “Improve and optimize workflows. Become more efficient.”</li> <li>d. Change and collaboration: “Share knowledge between divisions.” + “Engage, empower and stimulate bottom-up innovation and collaboration.”</li> <li>e. Customer: “Continue to provide quality service to customers while focusing on employees’ needs and concerns”</li> <li>f. Communication: “Clear define and communicate goals.”</li> <li>g. Digital and technology: “Digitalization of the interfaces and connecting data to be a market leader.”</li> <li>h. Safety and sustainability: “Be a frontrunner in sustainability.”</li> </ul>

**Table 7** Summarized findings ‘Listening Campaign’ (Town Hall 4 2023, p. 11-14)

The Listening Campaign confirmed the issues that had already surfaced in everyday work and reflected the broader themes shaping LSC’s context: a

family-oriented yet feedback-averse culture, a deeply institutionalized safety-first mindset, an entrepreneurial pragmatism resistant to bureaucracy, and a siloed structure with blurred roles. It showed that the challenges observed during fieldwork were systemic rather than isolated and offered a starting point for the new strategic framework.

Alongside these cultural and structural dynamics, a long-standing focus on cost discipline had created restrictive hiring, succession challenges, and growing workload pressures. Over time, these tensions built quietly beneath the surface, until the shortage of time emerged as the most immediate constraint. From the start of my fieldwork, time appeared as the rarest resource: interviews took place during lunch breaks, meetings stretched into late evenings, and employees described how the overall pace had accelerated dramatically.

*“I will say though, since Oliver joined, he's really shaken things up quite a bit. [...]. And so, when he joined, that was by far the busiest I've ever seen people in this company” (1\_ERI, Pos. 54).*

Oliver's appointment further intensified this convergence. His leadership brought fresh momentum but also exposed the limits of the organization's intangible resources. With workloads escalating and employees describing this period as the busiest they had ever experienced, time scarcity became a defining condition of the transformation.

In sum, the transformation unfolded against a backdrop shaped by LSC's cultural heritage of family orientation, safety consciousness, and entrepreneurial pragmatism; by a vertical, siloed organizational structure, and by a resource environment defined by cost discipline and succession gaps. The convergence of these factors – amplified by rising workloads, fragile psychological wellbeing, and an acute scarcity of time – formed the setting from which the new strategic framework emerged.

## IV.2 LSC's Transformation Timeline

LSC's transformation started with the appointment of a new CEO, anonymized here as Oliver, in September 2023. His appointment marked a clear break from the company's long tradition of family-led leadership, as for the first time, the position was given to an external candidate. The underlying idea was to reposition LSC within a changing market, as technological innovations were increasing the competitive pressure. As Oliver later put it:

*"It's the competitors that I don't see that has the digital platform, a clean slate and comes up with something that we don't have" (BLT 2024 Conference Fireside Chat with Simon and Oliver, Pos. 28).*

In his first sixty days, Oliver focused on gaining a comprehensive understanding of the organization from within: he spent time on the shop floor, talking with employees across all hierarchical levels, and tried to grasp how the organization operated on a daily basis. At the same time, he launched a company-wide "Listening Campaign" to get a sense of what the biggest areas requiring improvement were alongside how employees felt within LSC. The campaign revealed a strong sense of culture and ethics, but also recurring frustrations around leadership, communication, and collaboration. The consolidated results of the campaign are summarized in Table 7. These results built the foundation for a new strategic framework, focusing on exploiting synergies between divisions by enhancing cross-divisional collaboration. Furthermore, the new strategic framework aimed at being 'the best employer' as well as 'the best investment choice' (Town Hall 4 2023).

The transformation towards that new vision began with the company-wide announcement in the Town Hall 4 2023 (an overview off the timeline see in Figure 8).

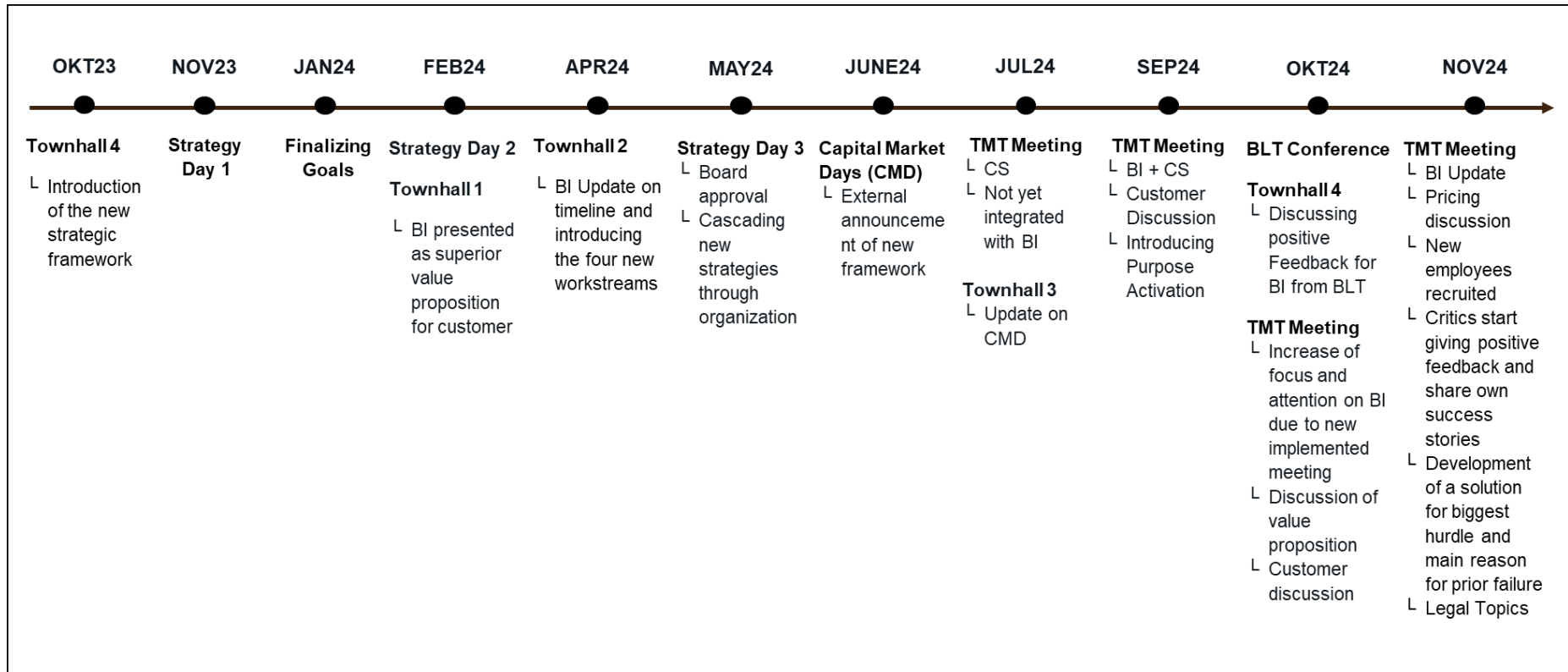


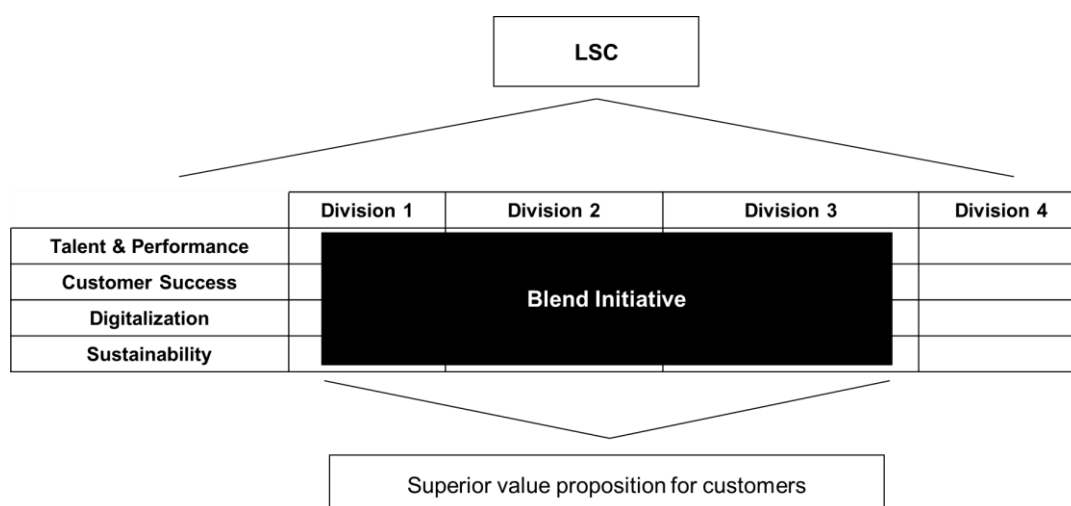
Figure 8 LSC's transformation timeline (Own illustration)

After that announcement, it unfolded in two closely connected phases, moving from strategic framing towards more concrete planning and structuring. The first phase focused on setting goals, defining ownership, and mobilizing employees. The second phase was marked by starting to implement the predefined goals while identifying and facing increasing challenges (“Strategy timeline” (Town Hall 4 2023, p. 30)). Yet, the two phases were not separated by a clear boundary. Practices that had emerged in the first stage continued to shape the second, although with changing weight and focus over time.

In practice, this meant that actions taken early on often revealed their full implications only months later, underscoring the temporal dependency of the process. The transformation therefore progressed in iterations, with continuous adjustments whenever initial approaches did not deliver the expected results. The maturity levels of the horizontal initiatives also varied considerably. Some, such as Talent Excellence, were extensions of existing programs, while others – most notably the Blend Initiative – had to be built entirely from scratch. This difference in maturity influenced not only the pace but also the sequence of activities that followed (“Strategy Development” (Town Hall 4 2023, p. 17)).

The first phase formally began in November 2023 with the first-held Strategy Day. This event served as the kickoff for planning and organizing the next ninety days, with the explicit aim of finalizing both horizontal strategies and vertical (divisional) goals by January 2024. By February 2024, the strategic goals were finalized, and the second Strategy Day was held. This full-day session shifted attention from high-level direction toward more concrete development. The mobilized teams worked on translating the new company vision into more practical paths, discussing possible ideas and structuring them into different workstreams. In the same month, the first Town Hall of the year provided an update on the progress achieved so far. At this event, the Blend Initiative was presented as the company’s “*superior*

*value proposition for our customers*” (Town Hall 1 2024, p. 17) while the other four horizontal initiatives were framed as its enabling pillars (see Figure 9). An internal visualization used during the event made this explicit by depicting BI as connecting the other initiatives – a visual cue that was later often cited when referring to the company’s new direction.



**Figure 9** LSC’s internal visualization of its new direction (adapted from Town Hall 1 2024, p. 17)

The next milestone followed in April 2024 with the second Town Hall of the year, where the Blend Initiative was presented in greater detail: Its outline was described by two distinct time phases – a proof-of-concept phase for 2024, followed by a scaling phase across 2024 and 2025. There were also four designated workstreams that had been prepared during the previous Strategy Days.

The third Strategy Day, which was held in May, marked the transition from the first to the second phase with the final board approval of the elaborated strategies and goals. The external announcement of LSC’s new strategic direction during its Capital Market Days also reinforced this transition. At this event, the divisional strategies and horizontal initiatives were presented in

detail, accompanied by customer testimonials and market outlooks (CMD Presentation, p. 1-132). The company also deliberately repositioned itself under the label of “*blended provider*” (CMD Presentation, p. 8), emphasizing that the new strategy would “*elevate business performance and unlock group-wide synergies*” (CMD Presentation, p. 24). This approval and external announcement set off a new rhythm of activity due to the company’s commitment to the board and investors. Plans that had long been discussed now needed to be implemented, and divisional leaders were expected to turn the strategic goals into tangible workstreams and deliverables. Ownership became more visible, but also more demanding, as expectations rose and progress became measurable.

*“We also presented a 5-year mid-term plan with our main pillars what we want to do. And also, with that all the underlining initiatives. That plan got approved by the board. That plan was aligned and linked with all existing projects. Now the pre-work is done, and we have to make it run” (Daily protocol, Pos. 117–120).*

In July 2024, the first Top Management Team (TMT) meeting – that I attended – took place. These meetings followed a structure that Oliver, the new CEO, had introduced early on. Some topics appeared on the agenda each time, others only every few months, depending on what was currently seen as important. Over time, this created a kind of rhythm that helped to set priorities and show where attention was needed most. Each meeting included updates from the appointed workstream leader and additional input from team members or external consultants. The July TMT was mostly focused on three initiatives – Customer Success (CS), Talent & Performance, and Sustainability. The CS initiative was especially relevant, since it later merged with the Blend Initiative. During the CS update, various assessments were presented to clarify the scope of CS and to outline the

resources needed for its realization. The plan included the appointment of a dedicated CS Manager, supported by three internal positions and the need for an external consultancy (TMT Meeting 0724, p. 9).

The update on the Talent & Performance initiative gave further insights into contextual factors described in Chapter IV.1.1. External consultants presented results from several employee surveys that had been carried out in the previous months. The data offered an overview of how change was being perceived across the organization. Feedback ranged from positive – people appreciating the clearer structures and more transparent processes – to concerns about workload and the number of parallel projects running at the same time. When asked whether they felt comfortable leading their teams through top-down initiatives coming from the TMT, 76 percent of respondents answered yes, while 24 percent were undecided or hesitant. These numbers indicated that the organization was, to a large extent, used to change processes that were designed and steered from above. At the same time, many pointed to recurring challenges: the need for clearer frameworks to lead initiatives, better communication, and more systematic ways of documenting lessons learned. Others stressed the importance of building resilient, change-ready teams and developing strategies to deal with resistance in a more open way. Additional comments pointed to known difficulties – limited alignment with supporting functions, shortages in resources, and the constant tension between priorities and morale. When employees were asked what they personally found most difficult about top-down change, they mentioned lack of influence, unclear communication, and the feeling of having to balance personal concerns with organizational demands. Overall, the surveys offered a detailed picture of how the transformation was being experienced in everyday work and how people across LSC were making sense of what change meant for them in practice (TMT Meeting 0724, p. 11-14).

Later in July 2024, the third Town Hall of the year took place. It included an update on the results of the Capital Market Days, where LSC had presented its new direction to investors and stakeholders. LSC reaffirmed its positioning as a “*blended provider*”, emphasizing its ambition to lift business performance and create synergies across divisions (Town Hall 3 2024, p. 12). Additionally, a leadership change was also announced serving as a reminder that the transformation was no longer abstract but happening within the organization (Town Hall 3 2024, p. 4).

In September 2024, the TMT meeting opened with a dedicated slot on digitalization. An external consultancy presented an overview of current market developments, pointing out which digital technologies were most relevant to LSC’s competitive environment and assessing the company’s current level of digital maturity. During the discussion, Oliver raised the question of what would be needed for LSC to reach a leading position. In response, several voices emphasized the need for an ecosystem map to better guide the company’s positioning (TMT Meeting 0924, Pos. 1-31). After this external input, the internal digitalization leaders shared their update. The aim was to secure TMT approval for the planned initiatives and to report on progress in data management, which was already closely linked at that point to the Blend Initiative (TMT Meeting 0924, Pos. 32-96). This connection underlined how BI and digital transformation were beginning to overlap in practice. The second part of the meeting focused on the Blend Initiative itself. It was announced that the Blend Initiative and Customer Success would be officially merged to strengthen their impact and coordination. A process overview followed, outlining the alignment needs across divisions. Two permanent positions were approved to support the initiative and ensure continuity in execution. The meeting ended with a customer success example from one of the selected companies. The case was discussed among participants to assess its relevance and to reflect on

how such examples could support the further development of BI (TMT Meeting 0924, Pos. 109-127).

October 2024 was marked by four major developments: the relocation of LSC's headquarters to a new office building, the fourth and last Town Hall of the year, a TMT meeting, and the BLT conference. The relocation symbolized both continuity and change. The old headquarters had often been described as aesthetically appealing from the outside but was widely perceived as lacking openness in its interior design. The new office introduced an open-plan layout intended to encourage informal interaction and greater accessibility. Employees commented that communication across hierarchical levels had become easier, while others expressed concerns about potential noise and the limited light in smaller areas such as phone booths. Some employees also questioned the costs associated with the move and the overall necessity for change. They pointed to the contrast between the new and modern infrastructure and the unchanged details of everyday life, such as the same coffee machines. These mixed reactions reflected a balance between openness to change and a cautious skepticism toward symbolic adjustments.

During the October Town Hall, the results of a second Listening Campaign were presented, conducted one year after the first. The survey asked employees to reflect on achievements and improvements over the past twelve months, areas that still required development, and suggestions for the year ahead. Reported improvements referred mainly to clearer communication, a more transparent strategy, and stronger integration across divisions and corporate functions. Areas for improvement were linked to workload and prioritization, the need for more frequent progress updates, and additional resources to support teams. Employees also offered concrete suggestions for the next twelve months. They emphasized keeping communication channels open, implementing the Blend Initiative across all offices, and focusing on initiatives with the greatest business relevance.

Further recommendations included more training and development opportunities, better information flow for frontline employees, and greater consideration of cultural and regional differences in daily work practices (Town Hall 4 2024).

At the October TMT meeting, the Blend Initiative was discussed in greater depth, with a continued focus on customer-related aspects – updates on the new value proposition, feedback from customers, and the identification of the right target accounts and contact persons. As the time allocated within the TMT meeting was no longer sufficient to discuss these topics in detail, Oliver emphasized the need for more regular meetings between the three divisional presidents and the vice president responsible for BI. In addition, a newly developed value proposition was tested with selected customers, using their feedback to refine the concept and adjust its implementation (TMT Meeting 1024, Pos. 58-74).

A few days later, the Broader Leadership Team (BLT) met for a week-long conference. The event brought together senior and middle managers to deepen their shared understanding of the transformation, strengthen leadership capabilities, and foster collaboration across divisions. The program combined panel discussions, fireside chats between the current and former CEOs, and interactive sessions in which each initiative team presented its objectives, progress, and main challenges. The format created space for open dialogue, collective reflection, and the identification of next steps. Through these exchanges, participants gained a clearer overview of all ongoing initiatives, which also influenced how the Blend Initiative was perceived. Leaders who had previously been critical began to see BI less as a redistribution of resources and more as a collective effort to respond to customer needs. The discussions created a noticeably more positive atmosphere around the transformation, with many describing a renewed sense of alignment and optimism, particularly regarding the future of the Blend Initiative (BLT Meeting).

In November 2024, the TMT meeting included updates on the Blend Initiative. The discussions focused mainly on an important operational aspect, particularly pricing, and confirmed the appointment of the first permanent staff members to support the initiative. Several of the previously critical voices shared positive examples from specific customer accounts, highlighting visible progress and first tangible results. Building on these experiences, account plans were presented as concrete measures to address earlier challenges and to link strategic goals more closely with day-to-day commercial practices (TMT Meeting 1124, Pos. 23).

No further Town Halls or TMT meetings took place by December 2024, and the year ended without major organizational events. The absence of formal gatherings marked a pause in an otherwise intensive period of activity, offering a moment of closure after a year in which strategy development had turned into deployment. Across different levels of the organization, employees had begun to translate strategic intentions into practical actions, gradually shaping the transformation in their daily work.

### **IV.3 The Observed Self-Reinforcing Mechanisms and their Constituting Practices**

The following sections take a deeper look at the analyzed practices and the formation of bundles in developing the self-reinforcing mechanisms. Section IV.3.1 provides an overview of the individual practices, followed by Sections IV.3.2 - IV.3.5, which outline how the respective bundles constitute the mechanisms. The chapter concludes with a cross-mechanism depiction that highlights their overlaps and correlations.

### **IV.3.1 Overview of Practices**

Before examining how the self-reinforcing mechanisms evolved, it is essential to outline the practices through which actors at LSC navigated the transformation. These practices represent distinct yet interdependent modes of engaging with uncertainty, translating strategic ambitions into action, and sustaining progress over time. They were not confined to specific roles or hierarchical levels; employees, middle managers, and senior leaders all enacted them simultaneously. Through these practices, the organization learned collectively how to move on from ambiguity to coordinated action. Together, they formed the practical foundation upon which the self-reinforcing mechanisms of adaptive expectations, coordination, learning, and complementarity could emerge.

#### **Inquiring**

Inquiring practices capture the ways that individuals at LSC surfaced doubts, questioned assumptions, and verbalized what was unclear or missing. They created reflection spaces in which uncertainty, frustration, or failed attempts could be discussed openly and reframed as actionable questions. Inquiries often expressed what otherwise remained unspoken, turning hesitation and criticism into productive tension that set new learning and coordination cycles in motion. As such, inquiring represented both a mirror of misalignments and the motor of progress, transforming uncertainty into direction.

#### **Framing**

Framing practices describe how strategic ambitions were translated, ordered, and defined across levels. They served as interpretive and definitional spaces, in which actors made sense of new directives, aligned perspectives, and negotiated meaning. Through framing, employees and

leaders alike answered the implicit questions of what this initiative meant for them and why it mattered, building a shared language and orientation for action. These practices therefore organized knowledge, connected dispersed interpretations, and provided coherence amidst ongoing change.

### **Deciding**

Deciding practices mark the moments in which competing demands and open inquiries were converted into concrete choices and priorities. At LSC, decision-making occurred primarily in TMT meetings, where issues were discussed, sequenced, and translated into clear directives for execution. These decisions set the rhythm for the transformation, as teams aligned their work with the latest guidance and prepared for the next iteration. Through deciding, abstract ambitions were operationalized, and accountability, ownership, and direction were re-established time and again.

### **Innovating**

Innovating practices reflect the ways that actors explored, tested, and implemented new approaches – from developing customer solutions to redesigning internal processes or experimenting with novel ways of working. They were not limited to product creation but extended to method development, language formation, and everyday adaptation. Innovation often occurred through trial and error, translating ideas into prototypes and tangible outputs that generated immediate feedback. Each act of innovation thus contributed to collective learning, coordination, and the shaping of expectations, creating visible evidence that transformation was taking root.

### **Structuring**

Structuring practices turned emerging ideas and successful experiments into formalized systems, roles, and procedures. They anchored what was working by building new teams, routines, and digital infrastructures that

supported collaboration and transparency. Structuring was both process and outcome: it provided continuity for the next iteration while embedding previous learning into organizational routines. Through structuring, temporary coordination patterns became enduring elements of the organization, gradually replacing ambiguity with order.

### **Mobilizing**

Mobilizing practices describe the ways that energy, commitment, and participation were generated and sustained. They included symbolic acts by the CEO, continuous reinforcement through communication, and collective events such as the BLT conference that created shared momentum. Mobilizing was a signaling act as much as an emotional one – it demonstrated direction, invited participation, and legitimized the transformation. Over time, it evolved from an external push to an internally generated dynamic, as positive feedback and collective success began to sustain motivation on their own.

Although these six practices can be distinguished analytically, they did not occur as isolated activities but as mutually dependent and overlapping processes. Inquiry and framing were particularly intertwined: questioning assumptions and surfacing problems often triggered the need to reframe meanings and boundaries, while new frames, in turn, shaped what kind of questions could be asked. Deciding and innovating were likewise tightly coupled, as decisions without experimentation remained abstract, while innovation without clear direction risked fragmentation. Structuring interacted with both, providing the stability needed for ongoing work while translating provisional solutions into enduring systems and routines. Mobilizing cut across all practices, since the generation of commitment and energy was both a precondition for and a consequence of progress in framing, structuring, and innovating. In this way, each practice built on the others: inquiries initiated new meaning-creation, frames guided choices,

decisions enabled experimentation, and structures anchored what was working. Taken together, these practices formed an interlocking web through which LSC's transformation was enacted – not as a linear sequence of steps, but as the evolving interplay of questioning, defining, deciding, creating, stabilizing, and energizing.

#### IV.3.2 Adaptive Expectations Mechanism

Within LSC the adaptive expectations mechanism was predominantly formed through **framing, inquiring, and mobilizing practices** and indirectly by **deciding**, and **innovating practices**.

Introducing the new strategic framework for the whole organization during the Town Hall 4 2023 opened up an 'expectation vacuum': Employees had to interpret the meaning of those initiatives and what they would mean for their own roles, their daily work, and the impact on their organizational environment. This therefore triggered curiosity and anxiety as employees tried to anticipate possible futures in the absence of clear structures. Yet, in the beginning, the new framework did spark an initial burst of enthusiasm:

*“And within Blend Initiative I think the sentiment at the beginning was, there was a lot of optimism at the beginning when Oliver first brought it up” (1\_ERI, Pos. 110).*

This was influenced by the positive **framing** of the strategy change, which was designed so that the organization not only aspired to be the best option for customers – with the Blend Initiative being the “*driver for superior value for the customer*” (Town Hall 4 2023, p. 17) – but also aimed to be the “*best employer within the industry*” and therefore an “*employer of choice*” (Town Hall 4 2023, p. 22). The responsible Talent & Performance initiative focused on creating a “*safe place to work and ensure employee wellbeing*” (Town

Hall 4 2023, S. 22) while simultaneously, the other initiatives created new career opportunities for employees who had been **mobilized** to be part of the transformation:

*“I mean, I only really I joined because one I like Johannes a lot [...]. Two, I thought it would be quite interesting to be honest, to be involved in one of these horizontal strategies. You know it's a pretty high visibility project. I thought it would be a good opportunity to work with some more senior people as well. So that's what was motivating me. But no, there was no sort of incentive on top of that” (1\_ERI, Pos. 90).*

Furthermore, the appointment of executive sponsors for every initiative, the engagement of external consulting companies, and the full-time appointment of Bruno as Vice President for BI showed commitment by the management, which in turn created legitimacy and the realization that *“this is something that's here to stay”* (1\_ERI, Pos. 110):

*“And I think like for the Blend Initiative, I think it's nice that someone – it's his role and full-time role, but yeah, exactly. And I think this is nice to have because we have a lot of initiatives that just add up on top of whatever role you have. And that's not sustainable, because if you want to actually come meet and get results, this cannot be a side thing to be like: “Oh yeah, 5% of my time is on the Blend Initiative. I don't have time this week, but maybe next week” (8\_JAJ, Pos. 121).*

*“I find in general now people are quite motivated about it. I think the fact that you know Bruno is now running this thing that's now his full-time job kind of shows that this is something that's here to stay. We're pumping resources into it” (1\_ERI, Pos. 110).*

It was not only the mobilizing efforts that created legitimacy in the initial stages: the board's **decision** to approve the finalized formulations of the individual initiatives, along with its decision to announce the new corporate framing externally during its capital market days, and strategic ambition to become "*the best choice for investors*" (Town Hall 4 2023, p. 24) further strengthened internal expectations that "*this is something that's here to stay*" (1\_ERI, Pos. 110). Moreover, the external communication reinforced internal commitment to the new strategy, as investor feedback was overwhelmingly positive.

*"Investors seem to love that messaging and that's always been a real problem for us, to be honest with you because so many of the investors that we do have, they just care about the ships. You know they don't care about Division 2 or Division 3 and I think if we can make that messaging clearer maybe via the Blend Initiative and then that would be a good thing" (1\_ERI, Pos. 132).*

This had the additional benefit that the other two divisions attracted greater investor attention, thereby creating reputational risks for the organization should they discontinue the collaborative and blended approach. After the capital market days, the initial stage characterized by heightened organization-wide communication and curiosity phased out.

*"And then I suppose the additional point as well is how I don't actually seem to hear that much about it like of all the horizontal strategies. I don't think I would be able to tell you right now what is going on any of them besides like the Blend Initiative. And I can't really recall the last time there was a specific communication about them" (1\_ERI, Pos. 114).*

In the following stage, the organization focused on developing the details of the single initiatives within the respective teams, concentrating communication in the monthly TMT meetings. This phase was marked by increasing **inquiries** in the form of detected blind spots, risks and challenges to overcome. In parallel, critical voices, negativity and reluctance, especially towards the BI – due to its failure in the past – had to be navigated:

*“So, the reality is that for the Blend Initiative, because of the history of it in the organization, there's a lot of negativities around it and has been. A lot of, there's plenty of doubt. There's plenty of, you know, people who just see it as - I would even go so far as they say “It's a waste of the time and we've done this before. Why are we doing it again?” There are others that say “Oh, well, we're doing this already. What are these guys going to do? Because we are doing it already?” And so that negativity has been a real challenge, I think. And unfortunately, it exists and has existed at every level in the organization” (17\_ADR, Pos. 30).*

The challenges and critical voices addressed different aspects. Some related to external communication, for instance voicing concerns that the company *“could get sued about what is being stated”* (TMT Meetings 0924, Pos. 103) and the reminder that *“everything has to be bulletproof, especially within the annual reports”* (TMT Meeting 0924, Pos. 108). Others were more operational in nature, such as *“finding innovative ways to compensate the work of checking different complex legal documents from possible customers and getting approval for each of the relevant terms without having to create massive documentation”* (TMT Meeting 1124, Pos. 6).

However, the factors with the greatest impact on shaping expectations were the reluctance of some TMT members, the increasing workload, and the growing gap between what was said and what was done. The reluctance

of the TMT, which due to adaptive expectations also mirrored the expectations of employees, resulted from resource conflicts delivering their own parallel divisional strategy alongside the horizontal strategies. In one statement, a president made clear:

*“My concern is all the horizontal strategies are now taking resources and time away from implementing the business unit strategy and that's where kind of myself and others on TMT members have said. You've got to realize that there's just more and more horizontal strategies coming in. It will actually directly impact negatively on the business unit strategy and our ability to implement it. So, if suddenly there's a kind of, yeah, but you've have to prioritize a horizontal strategy over a business strategy. Then I've got to go back literally to the board and say I will not be able to deliver the business unit strategy because it's been decided by London, which is fine. They can do that - to prioritize the horizontal strategies, but what we cannot do is both at the moment” (Daily protocol, Pos. 852).*

As the added horizontal strategies had been “*juggled on top of people's daily jobs*” (Daily protocol, Pos. 46-47) on every level, this led to increased workload without the company hiring new staff to execute or fill in the gaps.

*“I don't think they've hired any people internally to work on that. But going forward, I think if they want to make this a big thing then they will definitely have to hire people you know. Because Blend Initiative is an interesting one. I think there's a lot of hesitation for it, probably influenced by the fact that, you know, they've attempted this in the past and it didn't work.” (1\_ERI, Pos. 94).*

*“I think it's a bit of a you have a lot of great ideas but from them to be actionable, to be owned by some people, like it's too much and I like to me, I find it a bit weird that for example like I don't - at the top management level, like almost no one has been hired and we have this 25 new initiatives” (8\_JAJ, Pos. 141).*

In addition to the increasing workload, the unresolved challenge about how to optimally design the pricing of the new BI services and how best to share the revenues led to the critical stance that presidents and the divisions *“are not going to do charity”* (4\_HEN, Pos. 166). This shaped the situation that the single divisions did not explicitly include the horizontal strategies – respectively the BI – within their business goals, hence building reluctance to show commitment and therefore – again – shaping the expectations of the employees:

*“No, it is not, because for her it's not part of her strategy. 100% not. I can tell you it's absolutely not part of the strategy” (4\_HEN, Pos. 149).*

*“At the moment we see that we're trying to do integrated offering, but very clearly, each President is thinking for his own business, so he's like, “I'm not going to reduce my business with this customer” - even if it means you can increase your business and overall, we grow. Like, I'm not going to take the heat. That's what they say, right? Or “I'm not going to reduce my pricing so that we can have an overall offering for this customer. Because that's not my objective.” As a President of, you know, LSC Division 1 or Division 2 or Division 3” (4\_HEN, Pos. 88).*

These beliefs about subsidizing other divisions represented a case of 'history repeating itself', as this had been the critical factor behind the failure of the previous transformation attempt, as one president explained:

*"But this is really the crux of the problem, because one of the reasons it failed last time → everyone felt that they subsidized everybody else and the customer liver us against us. So, it is it is a difficult problem to overcome, but it is one we need to address" (TMT Meeting 1124, Pos. 21).*

These factors created a contrary belief about what was being framed and promoted about the transformation and what was being stated by the management team, leaving belief in success behind and negatively shaping expectations for the operating employees. Against this backdrop, employees were reporting contrary behavior by management:

*"He is telling us: "Just prioritize. You know and make it sustainable for you." He's really saying we should push back when it's not possible. But then his behavior is not saying that because then he's calling my leader to say: "How is the xyz framework going?" While we said the xyz framework was not a priority. He's on all day, all night and over the weekends and my leader gets that, and we get that. So, he's saying it, but he's not living up to that. That's the difference. And I keep on hearing him every time: Oh, you need to come and push back. That's how I experience" (Daily protocol, Pos. 838)"*

This eroded the expectations and beliefs that the company wanted to be a "safe place to work and ensure employee wellbeing" (Town Hall 4 2023, p. 22), while not creating psychological security about how to act accordingly within the transformation:

*“I think and there are opposing elements in our organization. You know the psychological safety of being able to make changes, but the user needs to have the tools or the skills or resource to back it up. Because you'll probably get there just with the enthusiasm, but it's more likely to fail and it's a hell of a lot more painful but I think if you don't have that psychological safety, then what do you have?” (10\_MOR, Pos. 149).*

During this second phase characterized by increased **inquiring**, a number of isolated **mobilizing** actions slowly shifted the negative expectations again toward more positive anticipation. For example, the recruitment of more leaders and employees as additional support for the transformation intentions:

*“We were really working in a silo way before Oliver joined. Now it's becoming more horizontal. Also did you hear the new VP for CI is coming next Monday? I'll send you the internal mail. He seems to be really experienced” (Daily protocol, Pos. 607).*

Additionally, the continuous support and positive framing from the new CEO Oliver – both within and beyond formal meetings – always mitigated negativity spikes.

*“And so that negativity has been a real challenge, I think. And unfortunately, it exists and has existed at every level in the organization. But the exception is probably Oliver himself” (17\_ADR, Pos. 30).*

In order to strengthen this positive **framing**, Oliver initiated the week-long BLT conference in mid-October, which marked a decisive turning point in fostering a more positive perception of the transformation's success. The overarching goals of the conference were **mobilizing and inquiring** as the focus emphasized *shared learning, gaining a holistic perspective over divisional and functional expertise and activating organizational purpose* (BLT Meeting, Pos. 2-6). Within the BLT, the different initiatives were presented in an interactive way that not only provided clarity, but also offered a platform for discussion and feedback. This, in turn, helped to answer open questions where previously, skepticism had filled the gap, leading to a more positive and even supportive perception of the individual initiatives.

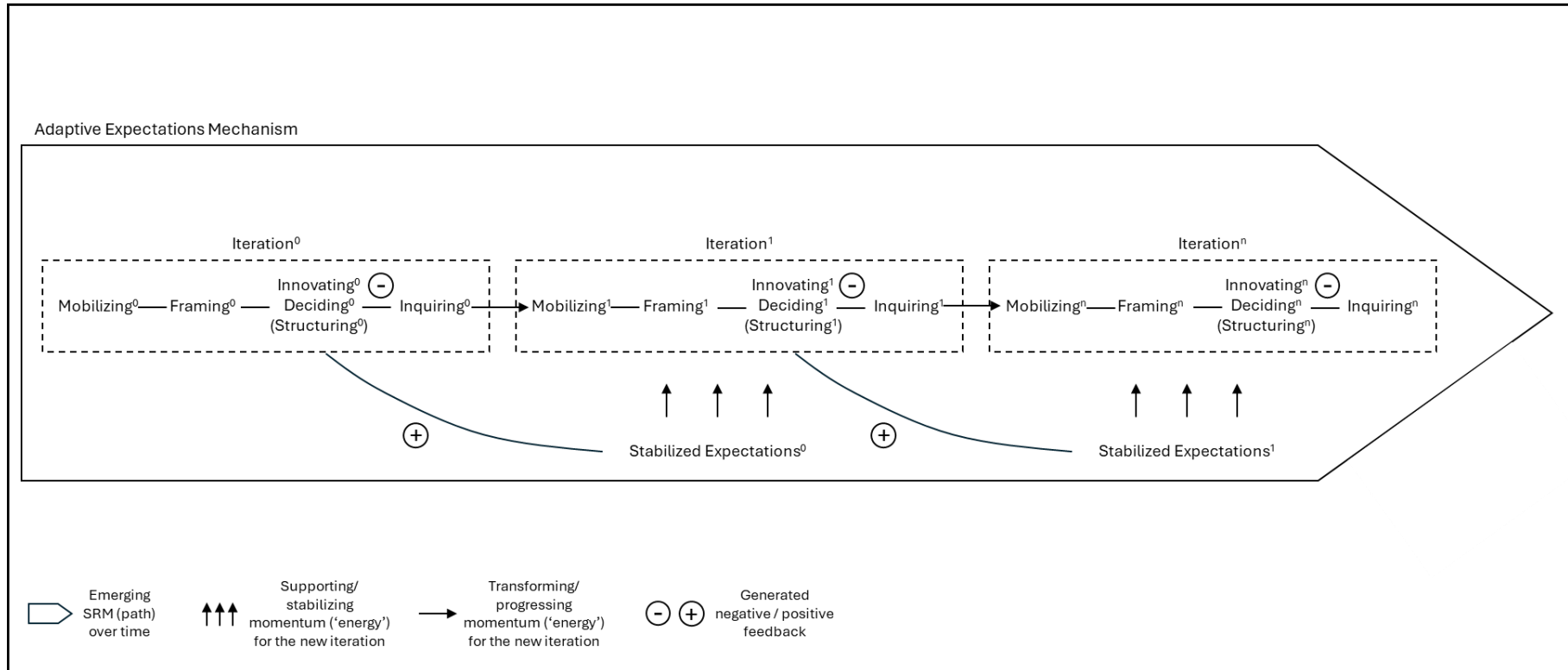
*“There's more of a [positive] vibe, I suppose, around the Blend Initiative. Even just in recent weeks, and that's great, and that really isn't by accident - we've worked really, really hard to get to that place. (17\_ADR, Pos. 29)”*

*“And it's really nice because what happens is that now it has more value and people start to see like, “Oh yeah, this is that.” So, what I heard back of the Broader Leadership Team (BLT) conference is that they had a part on performance or something and people are now in the business already reaching out to the BPs - like “How should I have my meetings with my employees because I want to do better?” And then I think that's what we or I see where I see the change as a positive change. That I think it's really nice there” (6\_RON, Pos. 154).*

After the BLT, this positive perception gained further momentum, as previously critical TMT leaders began to experience success stories with customers, where they were able to resolve customer problems by drawing on the prototype solutions developed so far by the BI. By sharing these

success stories in one of the last TMT meetings of the year, they also initiated a solution regarding pricing, revenue, and customer approach. Oliver clearly backed their plans, confirming that *“No one should agree on a price which is disadvantageous of any of the divisions. Every division should provide a price that they feel good for their individual business”* (TMT Meeting 1124, Pos. 3). With these steps forward, the transformation and the BI gained more legitimacy and expectations, shaping the general idea that the company’s future depends on shared outcomes rather than isolated performances.

In sum, the adaptive expectations at LSC unfolded in a cyclic process of **mobilizing, framing, innovating and/or deciding** and **inquiring practices** (see Figure 10). Mobilizing practices created commitment and energy, and engaged employees for the transformation, while framing practices shaped sense and translated the initiatives into what they meant for the individual or collective level, creating first expectations about the transformation. Dependent on the following execution (decisions and innovating) of the transformation, which resulted in positive or negative feedback e.g. new innovation works out (positive feedback), further expectations were shaped whether the transformation was going the right way. This also affected others’ expectations, starting a snowball system. In this case no further mobilizing practices are needed, so the intensity of those decreases as there are also no inquiries to solve, which also show negative expectation as things don’t work. If the execution of the transformation is negative, things don’t work out, certain decisions are not being made, or the results are unknown, expectations shape negatively, thus increasing inquiring practices (verbalizing these negative expectations and results, which also include open questions and fear about one’s own role or more regarding the bigger picture, the success of the transformation), therefore slowing down mobilizing efforts and also infecting others with negative expectations. Past negative experiences reinforce this.



**Figure 10** Emerging Adaptive Expectations (Own illustration)

### IV.3.3 Coordination Mechanism

After the introduction of the new strategic framework, a coordination vacuum emerged, which was characterized by a misalignment between strategic ambitions and existing operational routines. This became especially evident in unstructured teamwork and communication, as the divisional coordination pattern – marked by its own priorities, customers, incentive systems and fragmented communication – no longer supported a collaborative way of working. As a result, the organization was faced with questions about how the overall implementation should proceed, who would provide the necessary resources, and who was accountable – all of which called for a new coordination logic.

Therefore, the interplay of **decision, and innovating (and implicitly structuring) practices** – influenced by **framing and inquiring practices** – shaped a new form of collaborative and cross-divisional coordination, paving the way for more efficient interaction patterns for LSC.

The initial stage of the process began with **deciding on** the goals of the new strategic framework based on the findings of the Listening Campaign. In order to be able to execute this transformation, the TMT needed to **structure new** teams and therefore appoint executive sponsors, assigning responsible leads (such as Bruno for BI) and engaging employees who “*add meat to the bone*”.

*“So, there were the five horizontals that had a rough scope and a rough direction and then it got handed off to people lower down the organization then to really add the meat onto the bones of it. And that's when we got that early buy in” (20\_EMA, Pos. 49).*

The strategy days, therefore, created the first formal coordination setting where goals were **defined**, products conceptualized, and resource needs estimated. At this stage, framing and innovating practices went hand in hand as brainstorming and planning new workstreams was seen as the innovative outcome.

*“We have spent a long time kind of working through what does the Blend Initiative actually look like and what value would there be for customers” (1\_ERI, Pos. 127).*

The results from the strategy days were subsequently presented to and approved by the LSC board, followed by the external announcements of LSC as a blended provider for their shareholders. These decisions were closely tied to the following questions on how the transformation could be operationalized.

*“We also presented a 5-year mid-term plan with our main pillars what we want to do. And also, with that all the underlining initiatives. That plan got approved by the board. That plan was aligned and linked with all existing projects “Now the pre-work is done, and we have to make it run.” Questions are: How to start running? How to recruit leaders?” (Daily protocol, Pos. 117-123).*

Parallel to team formation and early coordination, the CEO and TMT institutionalized a recurrent communication format by introducing a standardized reporting structure for monthly TMT meetings. These meetings defined the cadence of initiative updates and evolved into the central arena for cross-initiative coordination.

*“TMT Slots were dictated by Oliver → How much time and how often which topic (called Principles) [...] TMT meeting changed its cadence from weekly to a monthly meeting” (Daily protocol, Pos. 51-55).*

During this first stage, the groundwork was laid for setting up a new coordination mechanism, by mobilizing workstream teams and deciding on a meeting rhythm. During the subsequent second stage, the mechanism began to take shape through discussing open questions and priorities. In the case of the BI workstream, debates concentrated on cost-benefit considerations – reflecting deeper tensions about revenue-sharing across divisions.

*“Yeah, my concern is on the horizontal strategies, and I've probably been the most vocal that there's a lot going on. There's no visibility. What's the cost? What's the benefit?” (Daily protocol, Pos. 847).*

Further concerns encompassed questions about who could provide expertise on specific topics, how commercial teams should be aligned, and which customers were the right choice for the BI. These issues were continuously addressed in the recurring TMT meetings, which became the key space for coordination: the BI team reported bottom-up, while the TMT recommended, guided and decided on new directives top-down.

These directives then had to be turned into actionable objectives for the next phase of execution, considering the organization's diverse cultures, shifting priorities, and prevailing uncertainty. This translation often depended on the intuition of the leaders in charge, who acted as interpreters between different understandings.

*“It is that we need to know, at my level, we need to cope with, you know, the LSC level a little bit more because it's more active decision*

*making, it's more active push down of objectives as strategic objectives. And then somehow you either need to absorb or cascade it" (12\_DEA, Pos.98).*

This interpretive ambiguity also raised concerns about the future identity of the organization as divisions began to converge.

*"And then there's, I suppose it's a good question as well, right, if the whole business sort of becomes homogenized then does that mean that there's no longer - there's just a single LSC brand? There's no more Division 3, there's no more Division 2, there's no more Division 1" (1\_ERI, Pos. 127).*

Through the monthly cadence of updates, a rhythm of coordination emerged, alternating between **deciding practices** and the subsequent **innovating practices**. Consequently, the decision-making phases were tied to the monthly TMT meetings, which focused mainly on customer-related progress and achievements.

*"What are deployment milestones? → Example of calculator used by xyz was shown" (TMT Meeting 0924, Pos. 121-123).*

*"Update on value proposition development → Testing on customer side → Feedback from the customer was shown / Marketing material was provided → Ideas from Oliver how to do advance them" (TMT Meeting 1024, Pos. 60-62).*

Moreover, the discussions also touched on internal structures within the commercial teams,

*“Which sales initiatives? Single teams needed for key accounts?”  
(TMT Meeting 0924, Pos. 117-118).*

or they were held on the required FTEs to further advance product development and to relieve the workload of voluntary internal supporters.

*“We need two supply chain specialists and one data analyst. And one marketing specialist” (TMT Meeting 0924, Pos. 116).*

*“And then I'm also supporting the Blend Initiative in my so-called free time [...] finding their ground on technology related stuff” (11\_KIM, Pos. 12-17).*

This led to a temporal bottleneck that was perceived as ‘slow’ or even ‘non-decision-making’.

*“I haven't seen a clear sort of steering committee mechanism where we actually really discuss something, make a decision, and then we're all on point. And then we just move forward like this. So, there are TMTs which are not only for Blend Initiative and for everything. So, we get invited to the TMT meetings. We can present an update, but what my experience is that we always get notified very late then at the end of the week we already need to put the presentation in front of them. So, it's not very qualitative and then it's not that we actually really get a decision out of them, it's more like we give them an update. It's going to be the same for the board meeting” (4\_HEN, Pos. 70-71).*

The existing hierarchical top-down structures further reinforced this effect.

*“So, and that I think that dynamic now of aligning both sides a little bit more - is a change and that also kind of influenced the decision making maybe a little bit more indirect or dependent on “Ok, we need to wait for what is happening top-down before I can act on something” (12\_DEA, Pos. 98).*

As a result, the **innovation** phases were largely shaped by coping, absorbing, and clarifying practices.

*“Oh, you cope with the dynamic. I mean, in various kind of different situations. So, if - what the best approach is - if you, for cross functional teams, of course, when you work on the project. But it starts with a business objective, problem statement, but also certain stakeholder mapping” (12\_DEA, Pos. 173).*

In this context, teams had to manage the enormous workload that followed each TMT meeting,

*“Awareness that after every TMT a ton of work will follow due to Oliver’s request for changes/adjustments but no “mental” preparation for it: How do we tackle it? “It will just come on top of our heads” → Wishing/hoping that it will not be that much work” (Daily protocol, Pos. 4-7).*

while at the same time dealing internally with negative sentiments and reluctance among colleagues.

*“And you know, despite having worked on this for almost a year now I think people still on calls asked the question of is this something that*

*the customer has asked for. And I think you do need to keep in mind as well that this project failed in the past” (1\_ERI, Pos. 127).*

And they were simultaneously innovating the new product and continuing to address the unresolved questions regarding budgets, ownership and authority.

*“Unclear to me also I'm program manager and I still don't know like do we have a budget? Who's paying for that budget? It's super unclear” (4\_HEN, Pos. 62).*

The simultaneous handling of different “construction sites” led to further **inquiries** to discuss at the following TMT meeting. Over time, these issues accumulated to such an extent that, almost simultaneously, the CEO announced a new top-down meeting involving all key decision-makers to address the open topics, while bottom-up, the BI program manager initiated a SteerCo to accelerate problem-solving

*“So, actually, next week I've planned the first SteerCo for Blend Initiative and CS together because we work together - it's all on the area and I'm supporting both programs. And, in this SteerCo I'll have Johannes and Valentin and then the leads of every stream under the program. And these for me will be the decision-making committee. And then Johannes and Valentin can communicate to their colleagues and other presidents that: “Hey, this is the decision we can give the update during the TMT. And if they are push backs then we need to take it. But that's how we for now we're going to take it.” And to me that's the first time that we're actually going to have a real meeting where we can make decisions with the decision makers and not be*

*just invited to some update where you know we're not really going to make a decision" (4\_HEN, Pos. 72).*

With the establishment of the new meetings, coordination was accelerated due to a tighter rhythm of decision-making and execution. In addition, coordination also became more focused after the BLT conference, as it shaped the shared understanding of the BI initiative, leading to more proactive behavior by the divisions towards the responsible team.

*"I think like pushing it a bit unnaturally makes it a bit like make people think about it etcetera and yeah. So, in that way, I would say, like you do want to get at least the discussion and sync up. Because now for example, we need to include like the Blend Initiative, what are the potential synergies with Division 1 or Tank Containers and now we have to actually ask them" (8\_JAJ, Pos. 84).*

This also marked a turning point for more corporate departments to explore linkages and support possibilities:

*"Again, marketing and commercial seems easier than implementing and drilling down, but at the end of the day, if we are keeping the conglomerate structure maybe we should change the way we are reporting internally in terms of this is not Division 3. This is not Division 1 this is the Blend Initiative Team. So, maybe we are creating another business internal reporting" (14\_CAR, Pos. 93-94).*

These interactions, in turn, sparked new ideas, which had been brought up at the next meetings to decide on – triggering again a new outcome to translate within the execution phase. This was repeated over several

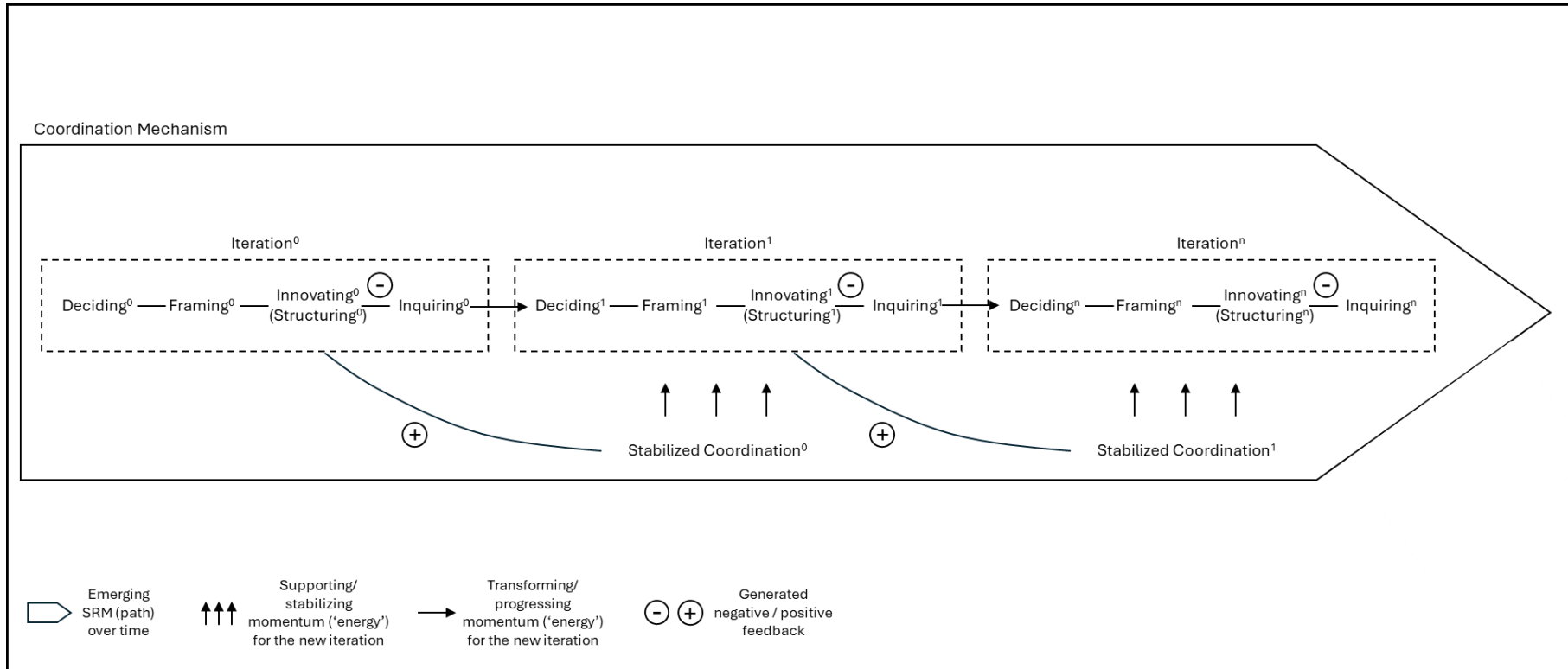
iterations until increasing clarity emerged, leading to clearer expectations and visions of how LSC would be coordinated in the future.

*“I was a Consultant for 8 years for company strategy and supply chain management. My theory on BI will be that, there will be One Commercial Team in the future – talking about the future of BI – and operating BU which are specified on that. We are really good in operations and numbers etc. but we might not be futural competitive with not changing that attitude” (Daily protocol, Pos. 788).*

Within the last TMT meeting of the year, the deciding and innovating part went hand in hand, while finally coming up with a solution for one of the biggest barriers in accepting and implementing the BI: the account plan. As everyone agreed and decided to go on with it, new questions were framed in terms of who will take over accounts, what the final account list will look like, and more details to further innovate and structure the idea. But this marked a new close-knit cycle of building the new coordination within LSC.

In sum, the coordination mechanism evolved through two main stages and subsequent iterations that gradually translated strategic intent into concrete collective action. Across these iterations, **deciding**, **framing**, **innovating (and structuring)**, and **inquiring** practices formed a recursive cycle feeding one another (see Figure 11). **Deciding** practices provided direction and prioritization, determining resource allocation, and therefore building focal points of action. **Framing** then translated these decisions into collective understanding, enabling leaders to contextualize and interpret shifting objectives. **Innovating (and structuring)** turned decisions into new coordinated action through alignment, balancing, and adaptation across organizational layers. Finally, **inquiry** reopened spaces for reflection, surfacing uncertainties and blind spots, which in turn triggered new rounds

of decision and framing. Together, these interlinked practices drove the emerging coordination logic while keeping it adaptive and reflexive.



**Figure 11** Emerging Coordination (Own illustration)

#### IV.3.4 Learning Mechanism

To implement the new strategic framework, LSC had to develop new structures, routines and also new services and products, which inevitably triggered the learning mechanism by opening up a 'learning vacuum'. This vacuum emerged through a lack of experience about how to develop the more collaborative and customer-focused way of working, as the old methods no longer served the new purpose. Therefore, this vacuum was characterized by uncertainty, learning-by-doing, and trial and error as new experience about what would work and succeed for LSC were needed but not yet tangible.

*“Biggest barrier change is learning. I think people need to learn. I mean the thing is to change people need to learn the new process in a new way and people sometimes aren't committing to that because it's easier to keep doing the same thing that you were doing. You don't need to think about it. So, you need to push yourself outside your comfort zone. So, and I think people are generally by default are probably a bit lazy” (15\_IRM, Pos. 165).*

These new experiences were developed by an iterative **innovating, framing and inquiring**-cycle turning abstract ambitions into practical capabilities for LSC.

*“But I think we understand why and where we want to go, how we need to work to get there. And everything today is only a strategy when you're at the strategy level it's difficult to understand how this is going to be happening. But on a strategy level, I think we've discussed enough and it's clear enough. It's okay, very clear the horizontals and*

*each of them is relatively clearly identified. Now it's a matter of doing them" (9\_GOR, Pos. 58-59).*

With the company's initial stage of transformation, the first learning iteration began by **inquiring about** LSC's greatest challenges and blind spots via the listening campaign and Oliver's first 60 days. These results **framed** the basic requirements for the formulation of the new overarching strategy, serving as a north star for framing the individual divisional strategies and the horizontal strategies.

*"Because what you saw with those horizontals, when they first came out, they gave us a North star. Right strategy for me is the planning that goes into it, not just setting that North Star and jumping straight to execution. The strategy is everything that sits in the middle. Driven by, of course, that North Star at the top-level objectives. And that's really what you saw with how we handled that as a start at the time. So, there were the five horizontals that had a rough scope and a rough direction and then it got handed off to people lower down the organization then to really add the meat onto the bones of it" (20\_EMA, Pos. 49).*

The Blend Initiative – as one of the horizontal strategies – therefore served as a learning arena for the whole organization, due to its nascent stage and its aim to develop both external customer and internal employee relationships that would shift from being highly transactional to becoming co-creative and strategic.

*"I think the Division 1 has also weirdly, has become a highly transactional group of people [...]. But it does lead to a culture that's very traditional, very conservative. And then like I said, when it comes*

*to the commercial side of it - the commercial approach is that it is quite a transactional approach. Which is a strange one. It is not a consulting one. Not strategic. It's quite in the here and the now and it's - yeah, we don't "look beyond this voyage" kind of thing" (17\_ADR, Pos. 58; 70-75).*

In this stage, the strategy days were used to start **framing and innovating** by brainstorming and identifying potential ideas, followed by the development of conceptual services, value propositions, and potential customers. These results were presented within the TMT and Town Hall meetings and were finally approved by the board in May, then externally communicated at the Capital Market Days event, signaling positive feedback for the conception. In parallel, the early assessment of individual customers and their interest also received positive feedback, but it **raised new questions** regarding product development, the potential customer base, and internal coordination, which led to **inquiring** about how these should be tackled.

This started the consecutive learning iteration – aligned with the second phase of the LSC transformation. This phase was marked by **innovation** through the development and testing of practical artefacts such as first service prototypes, marketing decks, and a master data management system.

*"I'm into a building a supply chain optimization model for a customer [...] and we're down in the mathematics, down in the details just trying to make that" (17\_ADR, Pos. 20).*

*"Well, I mean, if you see what, what, what Bruno is now doing work wise - it needs to still materialize. And then we were getting quite*

*some ad hoc requests and like IT is doing a master data strategy now that is on behalf of the Blend Initiative” (Daily protocol, Pos. 850).*

The outcomes and updates were then discussed at the monthly TMT meetings, offering space for reflection and **inquiry**. In this phase, prominent discussion topics were geared towards finding the right customer and how to approach them best: “*Who is who in the zoo? Who do we have to talk to?*” (SLT Meeting 091024, Pos. 69). This led to **reframing** “*the right partners for the program* (SLT Meetings 200924, Pos. 119)” and initiating to further **innovate** “*negotiation capabilities and supply chain knowledge*” (SLT Meeting 091024, Pos. 67). As this phase was focused predominantly on the customer base, while products, marketing, and the aligned (IT) infrastructure were still developing, the negative associations from past failures remained unresolved, and expectations were clashing with reality, this learning phase was marked by complex emotional dynamics.

*“I was really worried at one point earlier this year that we went through. We all go through emotions, you know, as a rollercoaster ride for all of us at different points. And I think I had, if I'm being really honest, there was a point earlier this year where I thought “Oh my goodness, this is, this is really difficult. Does the company even want this?” (17\_ADR, Pos. 134).*

These emotional tensions decreased with the third iteration, which was marked by **innovating** results reflected in **growing maturity** in product development and marketing materials, accompanied by increasingly positive feedback – not only from customers but also from critical leadership members who themselves began to experience customer success stories. Especially after the BLT conference, which served to consolidate **inquiry** and **framing** practices by offering a psychologically safe space for dialogue

and for identifying emerging solutions and areas of attention, the program manager stated:

*“So, yesterday we presented in the cafes like the 400 propositions, each value proposition is a stream. And now for three weeks we have dedicated teams for each stream with identified people, where they have actions, and they need to follow up on those actions. And in the last three weeks we’ve made, you know, actually very good progress.”*  
(4\_HEN, Pos. 79).

Since then, **inquiring** within the TMT meetings has shifted from abstract discussions about the customer towards **framing** practical solutions. This included the development of an account plan and considerations on how to train key account managers by adapting the existing standardized questionnaire to include more cross-selling content.

*“Suggested solution: We will take top 10 accounts and make an account plan → executive sponsor for every account → this person starts up the account team and agrees on the goals → absolutely critical to get this off the ground → and not only about increasing revenue or volume because we’re in a cyclical industry – could be counterproductive. It’s about driving the right behavior”* (TMT Meeting 1124, Pos. 22).

*“Recognizes the need for cross selling “we need to be better educated” “we don’t want to overcomplicate this” → it could be something as easy that one of the five standard questions we ask when you see a customer but there has to be an element more here”*  
(TMT Meeting 1124, Pos. 24).

This idea was remarked positively by the CEO and further elaborated by other leadership members:

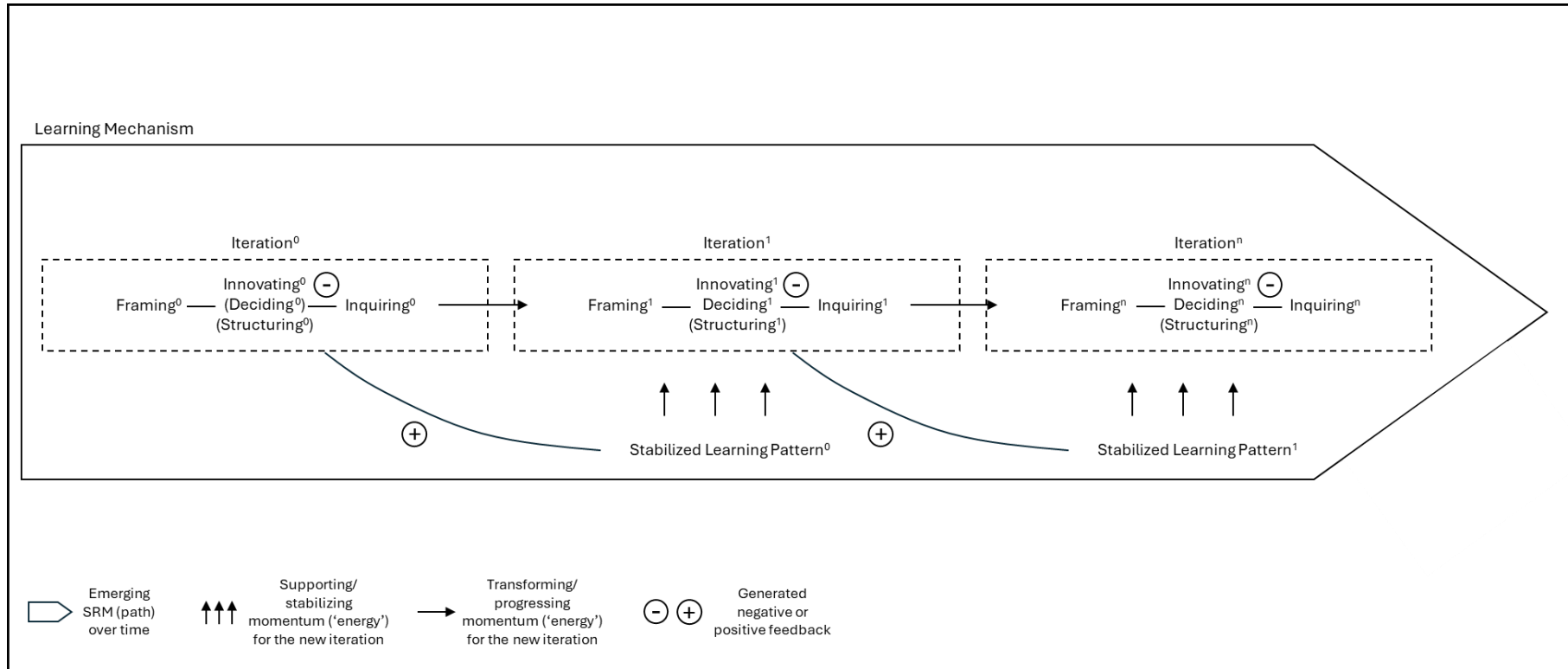
*“I really love how pragmatically you move us forward and that this is really about the customer and not only high level strategic” → “We still have to improve on the pitch presentations and at the end we have a framework on basically how we transform. Then we train everyone on it” → “Need also for steering and sharing best practices and there is also different maturity levels to take into consideration and we may try and fail early and then we pick another account” → “Who should be involved?” → “As soon as we have executive sponsor, pitch and tools we involve BLT” (TMT Meeting 1124, Pos. 26-28).*

Also notable at this stage was that references to the failed BI attempt began to be **framed** as learning, underlining what needs to be considered within the next **innovating** phase.

*“But this is really the crux of the problem, because one of the reasons it failed last time → everyone felt that they subsidized everybody else and the customer liver us against us. So, it is it is a difficult problem to overcome, but it is one we need to address” (TMT Meeting 1124, Pos. 21).*

By the end of 2024, the organization had taken a significant step: learning now focused on building practical capabilities directed towards the customer and on aligning internal collaboration, rather than remaining an abstract ambition. Therefore, the learning vacuum was both inevitable and necessary, as new experiences were needed to build these very practical capabilities.

In sum, the learning mechanisms proceeded to develop within iterations alongside the different transformation phases. Within these phases, **inquiring – framing** and **innovating** practices followed a cyclical structure while being fed by feedback (see Figure 12). Positive feedback mostly strengthened ideas and negative feedback mostly opened up new **inquiring** and **framing** practices, followed again by **innovating** practices triggering further positive or negative feedback. Therefore, **innovating** acted as the driving force, while discovering new experiences, building room for experimentation and triggering feedback. **Inquiry**, in turn, opened up space for reflection, making challenges, risks and blind spots visible and therefore serving as additional feedback. Lastly, **framing** served as interpretative space for collective sensemaking about how to continue within the next iteration.



**Figure 12** Emerging Learning (Own illustration)

#### IV.3.5 Complementarity Mechanism

Like the mechanisms described above, the introduction of the new strategy caused a 'system vacuum', which triggered the redevelopment of the complementarity mechanism. Old structures, technologies and processes had to be newly aligned to support the new cross-collaborative vision.

*"I mean, before it was very clear what the reporting line structure was like, but also where the mandate came from, which was Gustav back then, it was very clear. And then when Oliver came in, there was a clear shift. We noticed even the mandate from Gustav at that time was starting to shift. It was less clear and that raised a lot of alarm bells for us because we thought we have our strategy for the year" (16\_ELA, Pos. 76).*

This vacuum was not only organizational but also partly cultural, calling for the adoption of new routines, values and perceptions.

*"So, with IT we're a little bit used to this already you have like a how do you call that? Not a governance that's too - kind of more a culture and a community in place where you collaborate, where you share topics, where you work together on topics, where maybe in other areas it's now seen as additional workload. But there's also part of "why are you kind of bothering me?" "Well, why are you kind of deciding for me to do that?" (12\_DEA, Pos. 77).*

This in turn meant that newly emerging practices and processes had to be linked with new structural anchors – like systems, methods and ways of thinking – to support and implement the new strategy. Within LSC, this was

ensured by an emerging iterative, cyclic interplay of **innovating, framing, structuring** and **inquiring**.

Within the first phase, the complementarity mechanism only began to develop in a subtle manner. The predominant aim during this period was to first interpret what change would mean for the organization, define overarching goals, and brainstorm ideas on how to reach those – in other words, efforts were focused on implementing the new strategy at the cognitive learning, expectation, and coordination levels. Over time, these efforts resulted in first structuring outcomes in the form of mobilized teams responsible for the transformation and mindset anchors, which led to the realization that cross-collaboration required more structure, and that isolated efforts and ad-hoc coordination could not handle the growing complexity of the transformation

*“But I think the focus on the opportunity that is the thing that we're not doing. And that's the case, the thing that we're not doing enough. We do little bits of it. We don't do enough connecting, that joining the dots, that creating, looking for or finding and creating that synergy between the business units. Like between Division 1 and Division 2, which several people do around the world but we just need to start to do more of that and explore the opportunities to create a margin and create value at those points of interface” (17\_ADR, Pos. 94).*

*“And then I guess the impact of technology more broadly, super kind of generic of course. But can we utilize technology to do something that would have taken us days. That's the kind of what we seem to be able to do. But I am open to the listening and learning as we have a new VP of continuous improvement training. It will be very interesting to see, what techniques and capabilities we can utilize” (10\_MOR, Pos. 118).*

These accumulated efforts from the initial phase, which resulted in first structural elements and a more nuanced understanding of the cultural adaptations required, served as a catalyst for the actual formation of the complementarity mechanisms in the second phase of the transformation. This second phase was characterized by a gradual shift from a functional and transactional customer focus toward more strategic and integrative forms of interaction, accompanied by the internal transition from a divisional structure to cross-functional collaboration. This shift was structurally anchored by **innovating new technologies** and adapted **ways of thinking**. On the **technological side**, a new master data management system (*Master Data Topic* (SLT Meeting 091024, Pos. 42)) was **developed** within the Blend Initiative to facilitate access to customer data, which **had been distributed across** the individual CRM systems of the separate divisions. This enabled the alignment and **structuring** of available customer information and helped to avoid redundancies and fragmentation – especially relevant as around 70% of customers work with more than two divisions (ELT Meeting, Pos. 277) – thereby consolidating the data in one shared space. This new ‘tangible’ tool, then served further **framing** purposes in creating legitimacy and building expectations, which in turn fed or stopped further **innovating practices**. The following two examples, though not directly linked to the MDM implementation, exemplify the importance of framing for defining meaning and direction during subsequent innovation efforts.

*“Then when we presented it and we said, “Ok, this is what the impact could be” - we quickly realized that people didn’t understand what we were saying. So, it was very important for us to take people along on that journey. To make it happen, but then also take time to build trust, that they can believe that you can do what you’re saying. And it’s*

*interesting that now that we have made SoftwareB a success - now we're talking about the same problems that you want to solve, but now there is more trust in the organization that we can do it. And there's also probably appetite for some of our leaders or, you know, the BLT team members from a Division 1's perspective to work with some of this, because now they can see what technology can do" (11\_KIM, Pos. 108).*

*"I mean, there is always a - the discussion is around, yes, it makes sense or the technology makes sense, but no, it's not for us. More and more often we arrive at the conclusion that yes, it makes sense as an investment for LSC ventures but doesn't necessarily make sense for other customer like Division 1" (15\_IRM, Pos. 90).*

A further technological initiative was jointly initiated by a program manager from Division 4 and an employee from the IT department, who were **developing** a project management tool designed to provide an overview of all ongoing projects, which had been lacking within LSC, often leading to duplication, fragmentation, and misalignment.

*"What I'm doing now or one of the things that I'm doing now is about project management. We are generating the project management system in Division 4. And I am in very close contact with Max as I told you. We are generating this project management system with the LSC Group hat. So, I started doing it for Division 4. And then I connected with the group and I realized that the group was using already some tools that were beneficial for us. So, the very first discussion that I had with Max was, whether we try to create a tool or an approach or something that is beneficial for everybody. So, not only for me or for Division 4, but for everybody. So, this is how we are doing it. So, we are trying to create a system, a tool that is for everybody. So,*

*everybody gains of what we are doing in Division 4, you know” (2\_LIS, Pos. 79).*

Establishing this tool marked the first step of **aligning and structuring** existing systems and methods towards unified program management. This also had implications on shifting the company culturally from the longstanding tradition of *“in an unstructured way, we do it anyway”* (16\_ELA, Pos. 37) towards:

*“On project management, we have improved a lot because we have now a project manager and we are working in a different way, more structured with more communication” (9\_GOR, Pos. 96).*

And this was also to face organizational **inquiries** like

*“Actually it [the transformation program] needs an own PMO but that doesn’t exist which is crazy” (Daily protocol, Pos. 265).*

This illustrates how **innovating** and **structuring** on the technological side also shaped cultural aspects. Yet, cultural adaptation did not occur solely as a by-product of these developments; it was also driven by individual initiatives, such as the **innovation** of the incentive and performance system within the evolving complementary system.

*“I think it was something like before 60% of your bonus would be decided by Division 1 net profit and then 40% group, whereas now it's the other way around now. 40% is Division 1 and 60% is group. And so, I think that's an action that that probably came from Oliver, but I'm just hypothesizing to promote this Blend Initiative way of thinking right*

*that you know we're one group, you know we're not separate divisions" (1\_ERI, Pos.102).*

This rather subtle yet powerful change gradually translated (**framed**) cultural intentions into tangible consequences, by embedding collaboration into the company's formal reward **structures**. This in turn increased critical voices and **inquiries** around the BI and its revenue-sharing implications, calling for the next **innovating** phase.

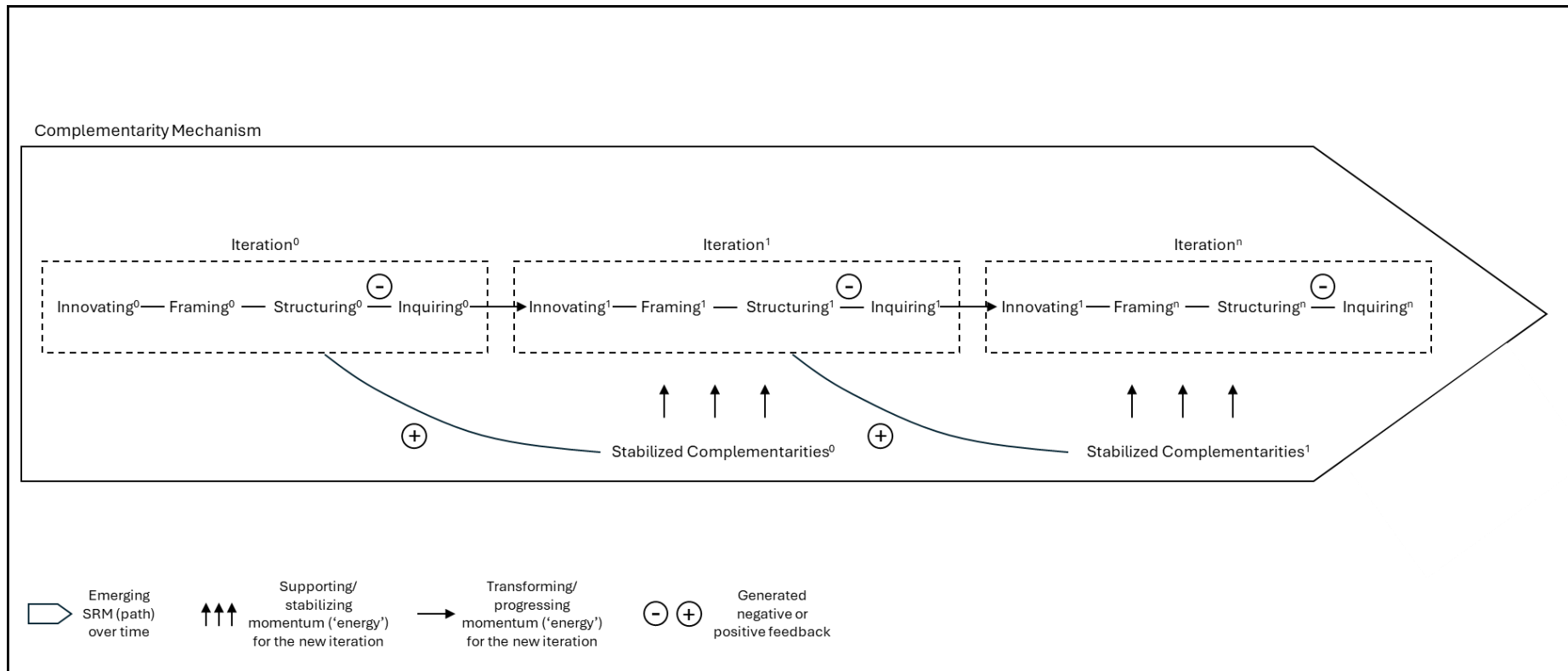
The BLT conference and the subsequent TMT meeting in November therefore marked the transition to the third phase – the third iteration in which complementarities evolved further. During this phase, the revenue issue was addressed through the implementation of an account plan, the development of the project management and master data management systems was expanded, and cultural aspects were adapted further – all growing in parallel with the learning, coordination, and expectation mechanisms. Additional synergies were also identified and addressed to further strengthen and support the practices implemented so far, for example, through the innovation of the existing change management process.

*"So, if you still have a change management process and if you still keep the way people are using to work from 10 years ago and they think "Oh, I will keep doing that to the coming five years" yeah, that won't work, you know. So, we really need to get employees and managers on board to embrace the idea, to embrace the new strategy to break that wall, you know?" (18\_CHA, Pos. 222).*

By the end of the observation period, the company's transformation had gained visible form: **project management systems were established, incentives aligned, coordination routines formalized, and cross-initiative linkages strengthened**. Yet complementarity remained dynamic.

Its true achievement lay not in closure, but in enabling continuous renewal – ensuring that learning and innovation could coexist with structure and stability.

In sum, the complementarity mechanism evolved gradually throughout the transformation phases, developing through an iterative interplay of **innovating, framing, structuring, and inquiring** practices. Within these iterations, the four practices formed a cyclical and mutually reinforcing pattern (see Figure 13). **Innovating** acted as the initial driving force by introducing new technologies, systems, and methods that embodied the strategic vision and created tangible anchors for collaboration. These innovations triggered impulses for **framing** practices, which provided shared meaning, legitimacy, and direction, translating technical or procedural changes into collectively understood purposes. **Structuring** practices followed as the stabilizing force, embedding the emerging innovations and meanings into formal routines, roles, and incentive systems, and aligning technological, organizational, and cultural domains. Through this institutionalization, complementarities between systems and people began to consolidate and create visible coherence, while **inquiring** practices maintained adaptability by exposing misalignments and feeding insights back into renewed innovation. These cycles of structuring, framing, innovating, and inquiring practices thus translated overarching aspirations into a system architecture in which strategy, structure, and culture were iteratively aligned, and synergies could be leveraged. Complementarity at LSC thereby evolved as both a process and an outcome – a living system that absorbed feedback, synchronized activities, and maintained coherence across multiple moving parts. Structuring was central to knitting these elements together, while innovating ensured that new propositions were embedded into the organisational fabric. In doing so, the structural anchor was built that allowed the other mechanisms to endure and recursively refine one another.



**Figure 13** Emerging Complementarities (Own illustration)

#### **IV.3.6 Overlaps of the Self-Reinforcing Mechanisms and the Respective Practices**

The emergence of the four self-reinforcing mechanisms at LSC – adaptive expectations, coordination, learning, and complementarity – did not unfold as isolated processes but as **intertwined and mutually reinforcing cycles**. Each mechanism followed its own internal rhythm, yet all shared a similar temporal and practical logic built around **mobilizing, framing, innovating, deciding, structuring, and inquiring practices**. These practices appeared in overlapping patterns, sometimes sequentially, sometimes in parallel, and together they created a dynamic through which uncertainty was gradually turned into organized action and later into structural or cognitive stability. Over time, the repeated engagement of these interlinked practices built momentum, transforming the mechanisms themselves into self-reinforcing cycles. The overlapping emergence of the self-reinforcing mechanisms across the single transformation phases is depicted in Figure 14. At the beginning of the transformation, the introduction of the new strategic framework created multiple vacuums – a state of misalignment and ambiguity that cut across all organizational levels. Employees were uncertain about what the new direction would mean for their own roles, how and who would make decisions, and what collaboration across divisions would look like, as the previous routines and divisional logic no longer supported the new cross-collaborative ambition, while experience and systems for this way of working were lacking. Thus, adaptive expectations, coordination, learning, and complementarity all began to form simultaneously, each addressing a different dimension of the same organizational void.

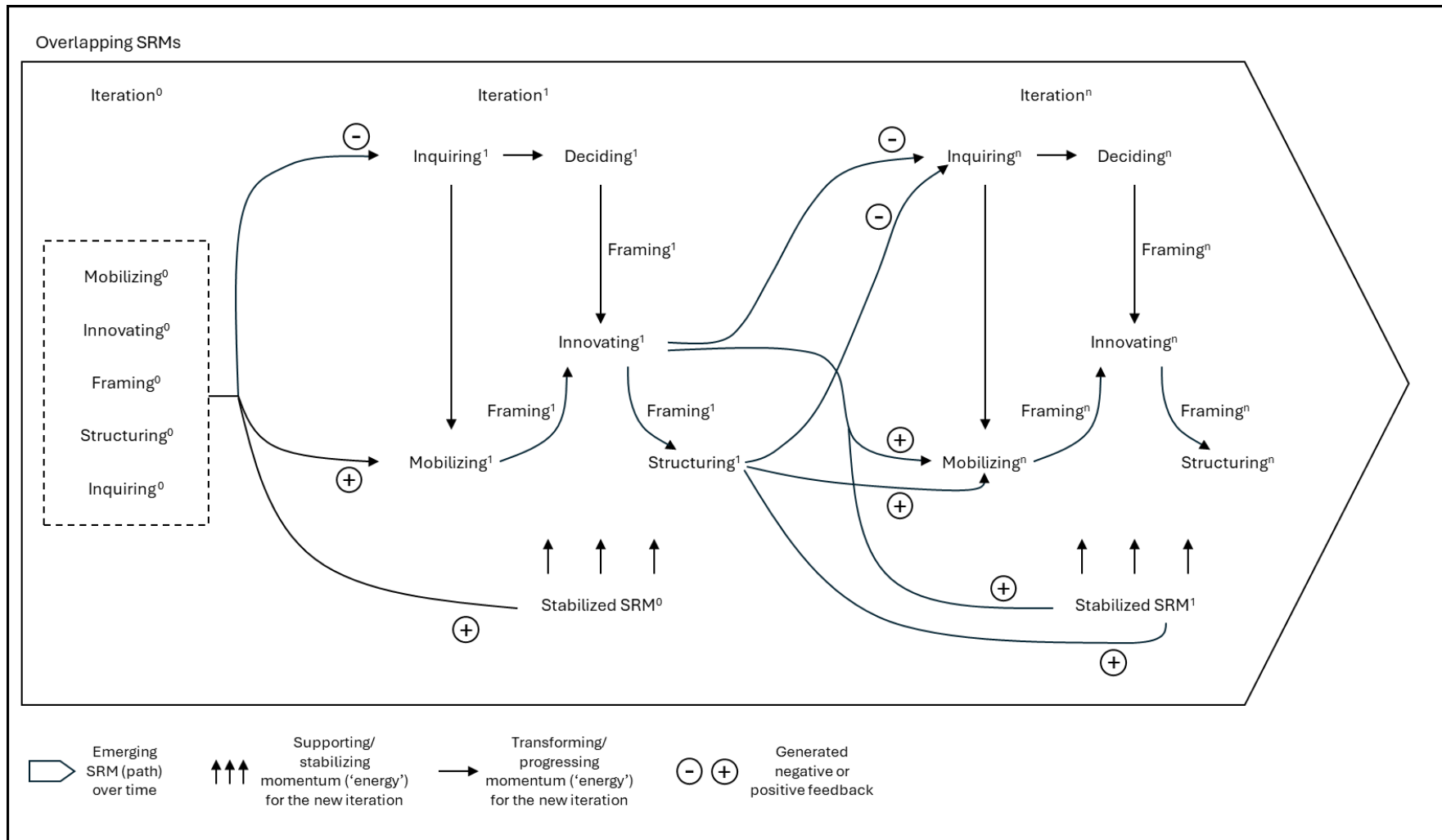


Figure 14 Emerging self-reinforcing mechanisms (Own illustration)

In this early stage, mobilizing practices played a central role. The CEO's announcement of the new framework, the establishment of executive sponsors, and early symbolic communication generated initial expectations and commitment, sparking positivity and enthusiasm about the change which was underway. These mobilizing efforts opened the first framing processes, which simultaneously triggered the emergence of all self-reinforcing mechanisms. At this stage, the translation of the strategic ambitions into practice was still broad, resulting in initial overlapping work packages that addressed the most urgent starting points for execution.

The first necessary step was to build teams and recruit volunteers who would begin shaping the transformation. In this way, the newly formed teams created the first structural anchor with an executive function, while also generating legitimacy and ownership for the change. These early efforts therefore encompassed deciding, innovating, and structuring practices at once, activating all four SRMs simultaneously rather than sequentially. The SRMs were then further developed within the newly formed teams through early innovation work. Learning and coordination, for example, were shaped by finding the right cadence for meetings or developing first ideas, translating them into workstreams and then assessing the customer demand for each one. They also estimated the resources and know-how needed, identifying where expertise existed internally or had to be brought in from outside. At the same time, these first conceptual frameworks and customer solutions established early structural and cultural anchors influencing the development of complementarities. The emerging "transformation language" ("*We are a blended provider*") not only aligned understanding across teams but also subtly shaped expectations and legitimacy as this new lingo spread throughout the organization. These initial mandatory activities set the groundwork for the transformation and were finally decided and approved by the board, followed by external communication at LSC's Capital Market Days. The announcement also received positive remarks from shareholders,

while encouraging signals from customers accumulated in parallel. Together, this early feedback created legitimacy, stability, and momentum for the transformation.

However, this optimism was accompanied by growing inquiries, as employees began questioning what the next steps of the conceptual approach would look like in practice, once the continuous execution of the initial ideas started to clash with reality. For example, since no additional FTEs were hired – due to the prevailing culture of cost discipline and close attention to headcount – but the implementation of both the horizontal and business strategies had to be carried out in parallel, the workload increased rapidly. This, in turn, influenced expectations in a negative cycle, as it also conflicted with the announced ambition of creating a psychologically safe environment. The effect was reinforced by decreasing mobilizing efforts, leading employees to question, “*why are we doing it again*” (17\_ADR, Pos. 30), often recalling the failed attempt from the past. At the same time, the number of inquiries related to learning and coordination gaps continued to rise – such as questions about how revenue should be shared, how legal documents should be aligned, or what the potential customer base would look like in detail. With the increase in such inquiries, more and more construction sites and uncertainties arose, which called for more concrete actions and problem-solving. This, in turn, led to the development of increasingly detailed solutions and thereby further advanced the self-reinforcing mechanisms in parallel.

At this stage, the growing number of inquiries became the driving force of the transformation. They acted as the fuel for progress, each question revealing gaps that required concrete action and new problem-solving to move forward. These inquiries were not isolated but deeply interconnected, often triggering several mechanisms at once. For the coordination mechanisms, for example, the inquiries were discussed and prioritized at the TMT meetings and initiated the decision–execution cycles that in turn

defined the rhythm and pace of the transformation. Since decision-making was highly centralized, progress often depended on the timing of these meetings, as many teams had to wait for guidance before moving ahead.

Each inquiry was processed, therefore, within a new loop of decision and execution in motion. For example, when an inquiry revealed that a targeted customer approach had not worked as expected, the topic was brought to the TMT meeting. There, it was decided to approach a different customer segment, triggering the next phase of framing within the teams. This meant that employees had to translate the new directive into practice by asking: what does this mean for us, and how do we make it work? They defined who should take ownership, who within the organization needed to be involved, what materials or data were required, and how to present the new offering. These framing processes led to the creation of new marketing materials, adjusted value propositions, and internal coordination plans. As these ideas were refined and executed, they turned into tangible actions and outcomes that were discussed again in the next decision cycle – thus forming a continuous rhythm of inquiry, decision, framing, and execution.

Throughout this iterative process, learning was deeply embedded in all mechanisms. Because learning itself consisted of inquiring, framing, and innovating, it was inherently intertwined with coordination, complementarity, and expectations, and this represented the core set of practices that linked the self-reinforcing mechanisms together. Each cycle of decisioning, innovating, structuring and mobilizing was therefore a learning process. Every new action tested assumptions, generated new experiences, and therefore created crucial feedback – positive or negative - that influenced how the next iteration would unfold. Positive feedback confirmed that certain solutions were effective and therefore strengthened coordination patterns, stabilized expectations, and gradually anchored what worked into the structural and cultural fabric. Negative feedback, in turn, exposed new blind

spots, opening new spaces for reflection that again became inquiries feeding the next loop.

As already stated, inquiries often touched several mechanisms simultaneously. A single question – for example, how to better connect with customers – thus not only involved coordination and learning, but also triggered complementarity, as it revealed the need for shared systems and infrastructures. This was, for example, the case with the development of the Master Data Management system, which emerged from the realization that customer information was scattered across divisions. Such innovations created tangible structures that anchored collaboration more firmly, showing how complementarity evolved as a by-product of resolving other gaps.

Parallel to these operational loops, mobilizing practices continued to play a crucial role. Given LSC's highly centralized structure and its culture of seeking direction from the top, energy and alignment depended heavily on continuous input from the CEO and the TMT. The transformation therefore remained fragile, as its pace and spirit were strongly linked to the visible commitment and presence of the TMT. The CEO's consistent messaging, his reframing of challenges into opportunities, and the initiation of formats such as the BLT conference served to renew engagement, address accumulated uncertainty, and symbolically reaffirm the collective purpose. These moments also worked as shared framing spaces, where meaning was reestablished and many open inquiries were resolved at once, resulting into new expectations.

Across these intertwined cycles, the self-reinforcing mechanisms continuously evolved with the same rhythm: inquiries drove action, decisions guided coordination, innovation and learning produced feedback, and structures anchored what worked. Positive outcomes built momentum, strengthened expectations, and fueled motivation for the next iteration, while negative ones re-entered the loop as new inquiries. Over time, this

continuous interplay turned fragmented efforts into increasingly aligned and coherent collective action.

Over time, the continuous processing of inquiries began to follow an increasingly recognizable rhythm. Each open issue – once discussed, translated, and executed – produced a form of closure that either resolved or refined the underlying uncertainty. Through these recurring cycles, the broad and overlapping construction sites that had initially dominated the transformation became more distinct and concrete. Inquiries that had once been fundamental – such as who is responsible, how resources should be shared, or how customers should be approached – now turned into more specific and technical questions about processes, ownership, and systems. The self-reinforcing mechanisms thus became more synchronized, and the organization’s attention gradually shifted from defining what to do to figuring out how to make it work in practice.

The BLT conference represented an important turning point within this development. It acted as a strong, mobilizing and framing moment, creating shared understanding, reconnecting employees to the overall vision, and providing a space to jointly address accumulated uncertainties. Many of the long-standing questions that had slowed down progress – for example, the revenue-sharing dilemma and the lack of clarity around customer ownership – were openly discussed. Shortly after the conference, during the following TMT meeting, these topics were taken up again and transformed into concrete decisions. Parallel to this, the critical voices within the leadership team began to soften, as even initially skeptical presidents experienced their first positive customer feedback and saw tangible success with the new product. This accumulation of validation – both internal and external – provided legitimacy and confidence that the approach was working.

At the same time, a stronger shift in language and interaction took place. The shared terminology – such as referring to LSC as a “*blended provider*” – spread quickly and became part of everyday conversations, signaling a

growing alignment in how employees made sense of the transformation. Especially after the BLT conference, more and more colleagues approached the initiative teams, offering support and linking their own work to the ongoing programs. This gradual convergence of language and purpose fostered new links between divisions and made cross-collaboration more natural.

As the organization collectively experienced how the solutions developed in previous cycles actually worked, the overall tone began to shift. Expectations became more optimistic, and the growing trust between leadership layers helped to stabilize coordination and strengthen collaboration. The cycles of decision, innovation, and structuring continued, but the nature of the inquiries changed. They became more detailed, addressing smaller inconsistencies or operational fine-tuning rather than fundamental questions of direction. With each iteration, major uncertainties were replaced by smaller, more manageable ones, reducing the overall friction in the system.

At the same time, mobilizing activities from the top gradually decreased. The transformation had begun to generate its own energy. The accumulation of positive feedback – from customers, from cross-divisional collaboration, and from internal achievements – became the new source of momentum. The earlier dependency on symbolic leadership impulses gave way to self-sustaining confidence built through experience. Positive results were no longer isolated events; they became part of everyday reality and proof that the new way of working could deliver outcomes.

This gradual narrowing of inquiries and the continuous generation of positive feedback marked a new stage in the transformation. The organization had not reached an endpoint but entered a phase of refinement, where learning, coordination, expectations and complementarity became increasingly integrated and mutually reinforcing. The remaining challenges were smaller, more specific, and embedded in the natural flow of

collaboration. Through this, momentum and legitimacy replaced the need for continuous mobilizing, allowing the transformation to sustain itself through its own practiced routines and shared successes.

## V DISCUSSION

Against the background of the empirical insights presented in Chapter IV, the following chapter offers an interpretive consolidation of how the identified practices shape the development of self-reinforcing mechanisms. Section V.1 examines the varying intensity and effects of the six practices across the observed phases and discusses their contribution to the unfolding dynamics. Section V.2 connects these findings to the broader theoretical discourse and outlines their implications for research on organizational path dependence. Section V.3 turns to managerial practice and highlights what the results imply for steering and influencing path-building processes in organizational settings.

### V.1 The Intensity and Effects of Practices on the Development of Self-Reinforcing Mechanisms and Organizational Paths

The research question of this very study is “**How do self-reinforcing mechanisms develop and remain in force?**” aiming to shed light on which daily practices form organizational path dependence. This perspective is essential because self-reinforcing dynamics do not emerge as abstract forces but materialize through recurrent, situated actions. Addressing this question is particularly valuable to further develop the social-constructive trend of path research and to understand how much agency and reflexivity organizations can realistically cultivate to shape their own ‘destiny’.

Against this backdrop, the findings presented in Chapter IV show that six consolidated practices – Inquiring, Framing, Innovating, Mobilizing, Structuring, and Deciding – influence and develop the self-reinforcing mechanisms by forming practice bundles and establishing a distinct rhythm

through their sequential configuration. Importantly, Inquiring emerged as the motor of these developments: by surfacing uncertainties, tensions, blind spots, and unresolved issues, inquiries initiated the subsequent cycles of framing, decision-making, and execution that gradually built reinforcing dynamics. For example, the learning mechanism follows a Framing–Innovating–Inquiring cycle, while Adaptive Expectations unfold through a Mobilizing–Framing–Executing (in the form of Innovating, Deciding, or Structuring)–Inquiring rhythm. These bundles, and the resulting “mesh of practices” (Schatzki, 2002), explain why the self-reinforcing mechanisms mutually influence each other, creating overlaps as well as direct and indirect effects. Furthermore, the results show that the self-reinforcing mechanisms remain in force through the momentum created by converting inquiries that embody negative feedback – the so-called ‘construction sites’ – into viable or authentic solutions that generate positive feedback. This positive feedback originates primarily within the more “executing” practices – Innovating and Structuring – because it is here that the actual conversion from problem to solution takes place. While these outcomes are subsequently cognitively anchored through further decisions, framings, and adjustments of expectations, their generative source lies in the successful execution work. In other words, the more construction sites an organization resolves over time, the more positive feedback enters the practice cycles in the Formation Phase, gradually replacing the initial mobilizing energy – which is especially critical at the outset of the transformation – with internally generated momentum that sustains the path.

While these summarized findings explain the gestalt of the self-reinforcing mechanisms and the practice bundles through which they emerge, the following sections build directly on the empirical insights and discuss the varying intensities and effects of the individual practices on the self-reinforcing mechanisms – and therefore on the logic of how a new path develops. The six practices did not occur in a uniform or static manner;

rather, they appeared with different temporal rhythms, varying degrees of force, and shifting relevance across phases. These variations are crucial because they directly shape the emerging path and determine whether reinforcing dynamics accelerate, stagnate, or dissipate. Understanding these differences also matters from both a managerial and theoretical perspective: only when the intensity and timing of practices become visible can organizations consciously influence or even manipulate the underlying mechanisms – whether the aim is to break an existing path or to stabilize and accelerate a new one in the interest of efficiency and strategic renewal. Figure 15 first addresses the question of practice intensity, while the Tables 8-10 later outlines the differentiated effects derived from our data.

As mentioned, Figure 15 visualizes the varying intensities of the six defined practices across the path process and how these shifts shaped the emergence and stabilization of a new path. To derive these intensity profiles, the empirically reconstructed practice dynamics and the identified transformation phases are mapped onto the path process proposed by Sydow et al. (2009, p. 692). This mapping allows the temporal structure of the process to be interpreted through the lens of Preformation, Formation, and the theoretically assumed Lock-in, while keeping the empirical developments at the center of attention.

In this representation, the first empirical phase at LSC was interpreted as the Preformation Phase, as multiple strategic options coexisted and actors faced a broad range of open questions and vacuums regarding how the new ambitions could be translated into practice, how responsibilities should be allocated, and which organizing principles would be required. This openness was further reflected in the exploratory character of the period, in which ideas were brainstormed, early decisions got sorted, and initial work groups set up. Such constellations are characteristic for the Preformation stage, in which different directions are still possible, and no dominant pattern has yet taken shape. The transition toward a more coordinated trajectory was

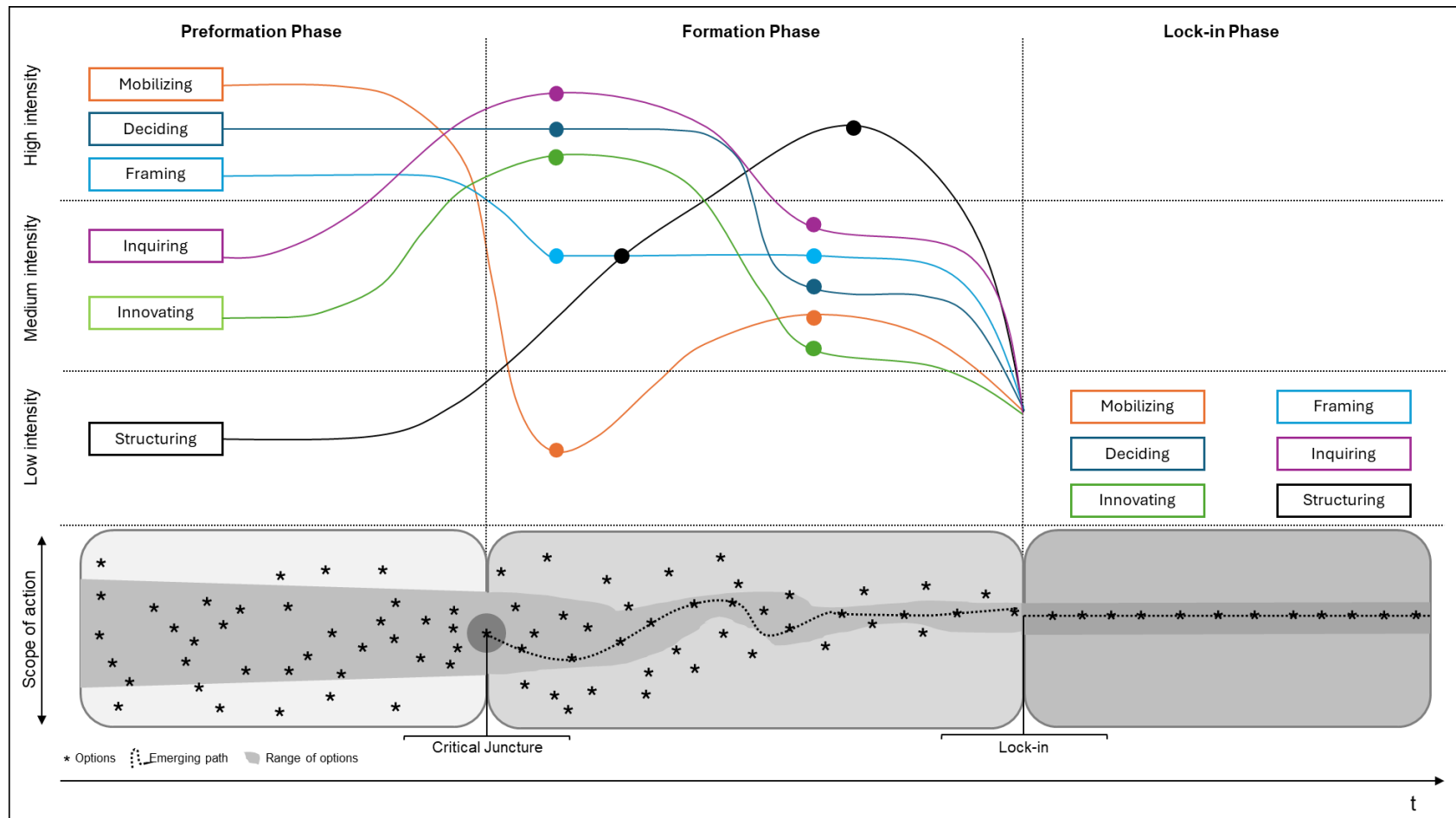
triggered by a critical juncture, in which key strategic commitments were formalized and publicly communicated – thereby narrowing the available scope of action and creating the conditions for a more consolidated development. The subsequent phases were interpreted as Formation Phases. During these stages, central “construction sites” were gradually addressed, emerging solutions refined, and coordination increasingly stabilized. At the same time, the evolving structures and routines still remained at least partly reversible; actors retained the ability to deviate, rethink, and reconfigure. This indicates that – even though the developing pattern gained coherence – its degree of stabilization had not yet reached the rigidity associated with a true lock-in. The Lock-in segment depicted in Figure 15 thus represents an analytically derived end-state based on established assumptions in path dependence research rather than an empirically observed condition. Therefore, Figure 15 depicts the temporal progression of a path process on the x-axis, while the y-axis shows the relative intensity of each practice. Here, intensity is not a quantitative metric but a qualitatively reconstructed relational indicator of how visible or influential each practice was within a given phase. This resulted in a three-level scale (low – medium – high), while practices may still vary within these categories. The scale is thus indicative rather than exhaustive. Building on this, the following sections take a closer look at how the intensity of each practice progresses across the examined phases:

### **Mobilizing**

The intensity of mobilizing practices is particularly high at the beginning of developing a new path, as they generate energy, motivation, and collective orientation. At this stage, adaptive expectations need to be addressed, and positive future images established to create legitimacy and organizational buy-in. Early mobilizing impulses such as visible leadership, personal addresses, symbolic communication and the recruitment of employees for

the first working groups provide direction and activate participation. These practices also serve to build the initial structural anchors required for coordinating and executing the transformation. In doing so, mobilizing practices consolidate temporal and communicative resources, as they set early cognitive and linguistic anchors that help to embed the envisioned path within the organization. In the case of LSC, for example, this included the emerging identification as a “blended provider” which symbolically marked the intended direction of the transformation and supported the alignment of expectations from the outset. At this early stage, mobilizing is also in conjunction with framing and deciding practices, as a high mobilizing intensity is often accompanied by increased translation work and fundamental decisions additionally generate legitimacy, which reinforces mobilizing efforts in return.

With entering the Formation phase, mobilizing efforts usually decreases, as the focus and energy of the involved actors shift toward executing the transformation. During this stage, the ongoing processing of emerging construction sites generates both positive and negative feedback. Positive feedback produces new mobilizing effects, since successful solutions create legitimacy. Negative feedback, on the other hand, is converted into new inquiries that often open space for individual interpretation, which in turn makes renewed mobilization efforts necessary to counteract such divergence and re-establish a shared orientation. At LSC, for example, this was done by holding the BLT conference. These counteractions often result in short mobilizing peaks (it is important to note that, for visual representation, mobilizing had to be categorized within the low-intensity range, even though this intensity is relative. What matters is that it remains lower than at the beginning of the process and lower than in the later course of action).



**Figure 15** Varying intensity of practices over time forming a path (Own illustration and path process adapted from Sydow et al. 2009, p. 692)

With the increase of positive feedback within the formation phase, mobilizing practices are gradually replaced by self-generated momentum: new structures are being established, and solutions are viable, so that less explicit impetus is needed. Towards the lock-in phase, the intensity of mobilizing practices therefore decreases to a low level but never drops to zero. This is because activity levels within an organization can never fall to zero, as everyday work in a social setting always requires some degree of coordination, communication and alignment. Even when the transformational energy has largely subsided and reinforcing routines have become dominant, a minimal layer of mobilizing practices remains necessary simply to keep organizational interaction going and to maintain the basic functioning of the path.

### **Framing**

Framing practices are high in intensity in initially setting up new paths as the new (strategic) ambitions need to be translated into viable and workable ideas and plans. At the same time, it also reduces insecurities and generates common sense across the organization, while establishing linguistic and cognitive frames. It therefore connects the strategic 'why' with the organizational 'how', thereby creating collective connectivity.

With entering the Formation Phase, the intensity of framing practices decreases but remains relatively constant before declining to a low level in the Lock-in Phase. This is because the initial fundamental questions have been addressed and translated into a broader organizational understanding, so that early meanings no longer need to be interpreted from scratch. Nevertheless, as the transformation continues, framing remains necessary, though in a more specific and adjusting manner. In other words, an organization increases its understanding over time of what is being done and needed until it's established its new goals. since every new problem or fundamental decision requires a renewed clarification of meaning.

Similar to the other practices, framing reaches a low intensity in the Lock-in Phase because a common and collective understanding of how the organization operates within the new path has been established. However, it never drops to zero, as framing remains necessary to address fine-grained challenges and new decisions. This ensures that ongoing developments remain interpretable and prevents the practice from disappearing entirely.

### **Inquiring**

Within the development of a new path, inquiring practices take on an important and dynamic role. As their intensity is more moderate in the Pre-formation phase, it is rising sharply within the Formation Phase. In the beginning it reveals gaps in knowledge, roles and structures, while initial excitement and mobilizing efforts still counterbalance critical voices. Once the transformation moves into operational execution it unveils deeper tensions, ambiguities and omissions resulting in a clash of vision and reality, which in turn reinforces further inquiries. These amounting inquiries thus have to be tackled over time, through new framing, deciding, mobilizing, innovating and structuring loops. Hence, Inquiring practices represent the actual engine of the path dependence development, since their processing either generates positive feedback that stabilizes emerging solutions and structures or uncovers new gaps that require attention.

Over time, the intensity of inquiring practices decreases to a low level within the Lock-in stage. Since inquiries will always arise and trigger continuous improvements of existing solutions, they play a role in securing the newly established path and therefore can never drop to zero.

### **Innovating**

Innovating practices typically begin with a medium intensity, as early innovation activities are primarily exploratory and aim at identifying options and testing initial conceptual approaches but are necessary to converge

towards executing the actual transformation. With the transition into the Formation Phase, the intensity rises considerably: new solutions, prototypes, processes or tools are developed, tested and iteratively refined. In this stage, innovating functions as a central mechanism of problem solving and provides the foundation for subsequent deciding and structuring processes. The high intensity results from the need to generate concrete answers to the Inquiring practices that emerge over time. Many of these solutions directly shape the development of complementarities, coordination and expectations. At LSC, this became visible, for example, in the establishment of new data and project management systems or in the development and testing of early customer solutions.

In the Lock-in Phase, the intensity decreases to a low level. Innovating shifts toward incremental improvement of existing solutions rather than more radical experimentation under high uncertainty. Like the other practices, its intensity can therefore never drop to zero.

### **Structuring**

The intensity of structuring practices is comparatively low at the beginning of a new path. At this stage, only a few basic elements are consciously created, such as initial teams, provisional responsibilities, or early meeting formats. These structures offer a first minimal frame, yet they remain loose and carry little binding force, since most attention still lies on exploration, clarifying core questions, and making sense of what the new direction requires in practice.

As the transformation moves into the Formation phase, the intensity of structuring increases markedly. This rise occurs because structuring is both an intentional activity and a consequence of the other practices. Inquiries reveal gaps that need formal solutions, innovations produce tools, processes and methods that require embedding, and decisions define roles, priorities and interfaces that must be anchored in routines. Structuring therefore

expands as these elements need to be aligned and translated into stable patterns. In the LSC case, this became visible in the establishment of governance routines, data and project management systems, and adapted incentive structures that supported the new way of working.

Later in the Formation phase, the intensity of structuring gradually decreases, even though the amount of structure in the organization continues to grow. Once core systems and coordination patterns are in place, fewer large-scale structuring activities are needed. The focus shifts to refining, adjusting, and stabilizing what already exists rather than building entirely new elements.

In a lock-in situation, structuring does not disappear. Its intensity simply settles at a low level, because new solutions, local improvements or small adaptations still need to be anchored in existing routines. At this stage, structuring becomes a maintenance practice that ensures coherence and allows the path to remain functional and resilient over time.

### **Deciding**

The intensity of deciding practices is high at the beginning of a new path, because early decisions are necessary to reduce initial openness, clarify responsibilities, and create the first points of orientation. Such decisions help actors understand what to focus on, how to structure their work, and which elements of the new direction require priority. In this phase, deciding sets the basic frame within which other practices can unfold, making it an essential source of early stability.

As the process enters the Formation phase, the intensity of deciding remains consistently high. New questions, emerging challenges, and the steady accumulation of “construction sites” require ongoing decisions about priorities, resources, processes, roles, or customer approaches. In this phase, deciding acts as a pacing mechanism: many activities are organized around decision cycles, and the speed of progress is strongly influenced by

how quickly and clearly decisions are made. Deciding is therefore closely intertwined with inquiring, framing, and innovating. Inquiries raise issues that require decisions, decisions then need to be translated into shared meaning, and innovations often depend on decisions to move forward. At LSC, this dynamic was visible in the strong influence of the TMT cadence on how quickly progress could be made. Toward the later part of the Formation phase, the intensity of deciding gradually decreases. By this point, many fundamental questions have been resolved, key structures are in place, and the main direction has become clearer. Decisions become more fine-grained, focusing on adjustments, refinement, and alignment rather than on defining the overall course. Their role shifts from setting direction to stabilizing what has already been established.

In a lock-in situation, deciding reaches a low, but never absent, intensity. Even a well-established path requires occasional adjustments and confirmations to remain functional. At this stage, deciding becomes a maintenance activity rather than a driving one, ensuring that the path remains coherent while allowing small adaptations without altering its fundamental direction.

Building on the intensity profiles shown in Figure 15, the following Tables 8-10 illustrate how the six practices influenced the four self-reinforcing mechanisms across the three phases of the emerging path. These matrices condense the empirical patterns into a comparative overview and make visible how the practices acted differently on adaptive expectations, coordination, learning and complementarity as the process unfolded. The effects show how the mechanisms were initiated, amplified, redirected or stabilized by the practices at different points in time. Phase 3 here represents a later stage within the Formation Phase and the bold marked effects represent the dominant/strongest effect(s) on the individual SRM. The four identified effects are generally described as follows:

- (1) **Initiating** refers to the effects that set a mechanism in motion by opening action, reflection or exploration spaces. They thus create the basic condition to create momentum from which self-reinforcing dynamics can develop.
- (2) **Redirecting** effects describe the shift of the mechanism's direction by surfacing tensions, gaps or misalignments that require further action. They thus ensure that a path is adaptable during its formation.
- (3) **Amplifying** refers to effects that strengthen mechanisms by adding energy, legitimacy or positive feedback. They thus arise from credible progress and accelerate the development of a path.
- (4) **Stabilizing** effects create continuity and reliability, allowing the path to sustain itself over time. It thus reduced variance and anchors emerging action patterns.

Within the Preformation Phase, initiating effects are predominant as the practices at this stage explore different options while conceptually preparing the new path. Table 8 summarizes the individual effects of the single practices on the specific SRMs, which are described in the following.

### **Mobilizing (Phase 1)**

- Adaptive Expectations: initiating – because early mobilizing practices create energy, direction and a first credible future image that actors can orient themselves toward. They address initial uncertainty and establish the motivational basis on which expectations begin to align.
- Coordination: initiating – because mobilizing activates people to form first groups and therefore bringing actors into shared spaces, which enables coordination to even begin.
- Learning: no effect – learning impulses emerge only indirectly at this stage and are largely overshadowed by orientation work.

- Complementarity: no effect – system-level interdependencies do not yet exist and mobilizing remains primarily symbolic and motivational.

### **Framing (Phase 1)**

- Adaptive Expectations: initiating / stabilizing – because framing translates strategic ambitions into understandable meaning structures, thereby reducing uncertainty and giving actors a shared interpretive anchor.
- Coordination: initiating – because framing makes early goals and logics comprehensible and enables actors to coordinate around a shared understanding.
- Learning: initiating – because framing establishes the semantic baseline that allows early learning about what the new direction requires.
- Complementarity: no effect – meaning-making precedes structural coupling, so system-level complementarities do not yet emerge.

### **Inquiring (Phase 1)**

- Adaptive Expectations: redirecting – because initial inquiries surface concerns, gaps and blind spots, subtly steering expectations away from overly optimistic assumptions.
- Coordination: initiating – because inquiring identifies missing roles, responsibilities or processes, which brings coordination needs into focus.
- Learning: initiating – because inquiries point to knowledge gaps and uncertainties that later drive learning cycles.
- Complementarity: no effect – although inquiries highlight omissions, they do not yet trigger system-building.

### **Deciding (Phase 1)**

- Adaptive Expectations: stabilizing – because early decisions provide clarity on direction, priorities and commitments, which gives expectations a first anchor.
- Coordination: initiating – because decisions reduce initial openness, define roles and create the first patterns of who works with whom.
- Learning: no effect – learning is only indirectly shaped as decisions define the scope of what needs to be explored.
- Complementarity: initiating – because decisions hint at future structural requirements, even if concrete system linkages are not yet formed.

### **Innovating (Phase 1)**

- Adaptive Expectations: amplifying – because early prototypes and workable ideas make the envisioned path tangible and credible, which strengthens belief in its feasibility.
- Coordination: initiating – because innovations give shape to emerging workstreams and require actors to coordinate around early concepts.
- Learning: initiating – because conceptual experimentation creates the first cycles of exploration and feedback.
- Complementarity: initiating – because early solutions point to where later systems, tools or processes may be required.

### **Structuring (Phase 1)**

- Adaptive Expectations: stabilizing – because even minimal structures increase predictability at a time of high ambiguity.
- Coordination: initiating – because first teams, roles and cadences provide a basic scaffold that enables actors to coordinate their efforts.
- Learning: no effect – since structuring is still too rudimentary to orient learning processes.

- Complementarity: no effect – because structures are not yet sufficiently developed to create interdependent system effects.

Practice/ SRM	Adaptive Expectations	Coordination	Learning	Comple- mentarity
<b>Mobilizing</b>	<b>initiating,</b> amplifying	initiating		
<b>Framing</b>	<b>initiating,</b> stabilizing	initiating	initiating	
<b>Inquiring</b>	redirecting	<b>initiating</b>	<b>initiating</b>	
<b>Innovating</b>	amplifying	initiating	<b>initiating</b>	initiating
<b>Structuring</b>	stabilizing	initiating		
<b>Deciding</b>	stabilizing	<b>initiating</b>		initiating

**Table 8** *The effects of practices on the development of a path within the Preformation Phase (Own illustration)*

The earlier stages of the Formation Phase are characterized by the intense processing of inquiries, problem clarifications and ongoing prioritization. Therefore, especially redirecting, amplifying and stabilizing effects are predominant. Table 8 summarizes the individual effects of the single practices on the specific SRMs, which are described in the following.

### **Mobilizing (Phase 2)**

- Adaptive Expectations: amplifying – because visible early results strengthen confidence in the emerging direction and renew commitment.
- Coordination: no effect – coordination is driven more by decisions and structuring in this stage.
- Learning: amplifying – because mobilizing draws attention to shared challenges and helps actors engage with emerging learning cycles.
- Complementarity: no effect – system-level linkages grow through structuring and innovation rather than mobilizing.

### **Framing (Phase 2)**

- Adaptive Expectations: stabilizing – because framing contains uncertainties and keeps meaning structures coherent despite setbacks.
- Coordination: stabilizing – because shared interpretations help different units remain aligned as complexity increases.
- Learning: redirecting – because framing interprets problems and signals how inquiries should be approached.
- Complementarity: redirecting – because framing highlights how emerging elements ought to work together.

### **Inquiring (Phase 2)**

- Adaptive Expectations: redirecting – because accumulating inquiries challenge assumptions and reveal where expectations must be adjusted.
- Coordination: redirecting – because inquiries expose coordination gaps and make reconfiguration necessary.
- Learning: amplifying – because persistent questions intensify learning needs and spark new solution cycles.

- Complementarity: redirecting – because it exposes system gaps and incompatibilities between structures, prompting reconfiguration and integration.

### **Deciding (Phase 2)**

- Adaptive Expectations: stabilizing – because decisions create clarity when expectations become volatile.
- Coordination: stabilizing – because prioritization and resource allocation provide structure across interdependent activities.
- Learning: redirecting – because decisions channel attention toward feasible options and reorient learning processes.
- Complementarity: stabilizing – because decisions increasingly formalize how elements should fit together.

### **Innovating (Phase 2)**

- Adaptive Expectations: amplifying – because working prototypes and first results reinforce belief in the viability of the path.
- Coordination: stabilizing – because tangible artefacts require and enable more consistent interaction patterns.
- Learning: amplifying – because solution development accelerates learning through iterative cycles of trial and error.
- Complementarity: stabilizing – because emerging tools and processes begin to interlock and support a shared direction.

### **Structuring (Phase 2)**

- Adaptive Expectations: stabilizing – because formal routines, roles and systems create reliability amid ongoing change.
- Coordination: stabilizing – because governance, systems and processes solidify how collaboration works.
- Learning: no effect – learning is shaped mostly by inquiring and innovating at this stage.

- Complementarity: stabilizing – because structural elements begin to align and support one another.

Practice/ SRM	Adaptive Expectations	Coordination	Learning	Comple- mentarity
<b>Mobilizing</b>	amplifying		amplifying	
<b>Framing</b>	stabilizing	stabilizing	<b>redirecting</b>	redirecting
<b>Inquiring</b>	redirecting	<b>redirecting</b>	<b>amplifying</b>	redirecting
<b>Innovating</b>	amplifying	<b>stabilizing</b>	<b>amplifying</b>	stabilizing
<b>Structuring</b>	stabilizing	<b>stabilizing</b>		<b>stabilizing</b>
<b>Deciding</b>	amplifying		amplifying	

**Table 9** *The effects of practices on the development of a path within the Formation Phase (Own illustration)*

Within the later phase of the Formation Phase, stabilizing effects are predominant as routines take hold, roles become clearer and structures increasingly support the path forward. The SRMs feed off each other and develop a coherent, largely self-sustaining dynamic, which subsequently over time leads to the Lock-in Phase. Table 9 summarizes the individual effects of the practices on the specific SRMs, which are described in the following.

### **Mobilizing (Phase 3)**

- Adaptive Expectations: stabilizing – because momentum increasingly stems from visible results rather than deliberate energizing efforts.
- Coordination: no effect – coordination is now largely carried by established routines.
- Learning: no effect – mobilizing plays no active role in shaping learning at this stage.
- Complementarity: no effect – system-level reinforcement emerges through structures, not mobilization.

### **Framing (Phase 3)**

- Adaptive Expectations: stabilizing – because shared language and meaning are now well established and hold expectations together.
- Coordination: stabilizing – because consistent interpretive frames support alignment across units.
- Learning: no effect – framing only marginally shapes learning in this phase.
- Complementarity: stabilizing – because stable meaning structures support coherent system interaction.

### **Inquiring (Phase 3)**

- Adaptive Expectations: redirecting – small inquiries may adjust expectations in minor ways.
- Coordination: redirecting – because inquiries highlight local mismatches that require fine-tuning.
- Learning: stabilizing – by surfacing minor deviations and supporting ongoing refinement.

- Complementarity: no effect – inquiries influence local adjustments, not system linkages.

### **Deciding (Phase 3)**

- Adaptive Expectations: stabilizing – because fine-grained decisions support predictability and confidence.
- Coordination: stabilizing – since decisions now refine rather than redefine interaction patterns.
- Learning: no effect – learning is shaped mainly by inquiry and innovation at this stage.
- Complementarity: stabilizing – decisions ensure alignment across existing systems.

### **Innovating (Phase 3)**

- Adaptive Expectations: amplifying – small improvements signal ongoing progress and reinforce belief in the path.
- Coordination: stabilizing – because refined solutions support more consistent daily interaction.
- Learning: stabilizing – innovation focuses on refinement and incremental improvement.
- Complementarity: stabilizing – incremental innovations support stronger system fit.

### **Structuring (Phase 3)**

- Adaptive Expectations: stabilizing – because stable structures increase predictability and trust.
- Coordination: stabilizing – as established systems and routines carry the main integrative work.
- Learning: no effect – structuring maintains rather than shapes learning dynamics.

- Complementarity: stabilizing – by keeping system components aligned and resilient.

Practice/ SRM	Adaptive Expectations	Coordination	Learning	Comple- mentarity
<b>Mobilizing</b>	stabilizing			
<b>Framing</b>	<b>stabilizing</b>	stabilizing		stabilizing
<b>Inquiring</b>	redirecting	redirecting	<b>stabilizing</b>	
<b>Innovating</b>	amplifying	stabilizing	<b>stabilizing</b>	stabilizing
<b>Structuring</b>	stabilizing	<b>stabilizing</b>		<b>stabilizing</b>
<b>Deciding</b>	stabilizing	<b>stabilizing</b>		stabilizing

**Table 10** *The effects of practices on the development of a path within the later Formation Phase (Own illustration)*

In sum, within the Preformation Phase, most effects are initiating in nature. Mobilizing and Framing are central for addressing early expectations and reducing uncertainty. First inquiries surface gaps that prepare the ground for later learning and coordination. Early decisions and rudimentary structuring provide the minimal scaffolding that enables actors to begin moving in a shared direction. Complementarity is only subtly present at this stage, since system linkages and formal interdependencies have not yet emerged.

The Formation Phase marks the most dynamic period in which redirecting and stabilizing effects coexist. Inquiring becomes the central driver, since it exposes tensions, omissions and blind spots that require coordinated responses. Innovating intensifies and generates positive feedback through working solutions, while Structuring and Deciding increasingly stabilize emerging routines and interfaces. Framing continues to hold the meaning structure together by interpreting setbacks and aligning understandings. The interplay among these practices accelerates both learning and coordination, while complementarity begins to form as new tools, processes and governance patterns take shape.

In the later part of the process, stabilizing becomes the dominant effect. Structuring consolidates what has proven workable, Innovating shifts toward incremental refinement and Framing stabilizes the shared understanding of the path. Decisions become less frequent and more fine-grained, and Mobilizing decreases in intensity as momentum increasingly arises from successful practices rather than from deliberate attempts to energize the system. Inquiries do not disappear, but become narrower and more specific, contributing to ongoing adjustment rather than major redirection. These patterns illustrate how the self-reinforcing mechanisms become mutually aligned, without reaching a full lock-in, and how their interactions create a progressively more coherent and self-sustaining path.

## **V.2 Theoretical Implications for Organizational Path Dependence Research**

This study set out to illuminate how self-reinforcing mechanisms unfold in practice and thereby shape the constitution of an organizational path. Building on the theoretical foundations laid out in Chapter II, the empirical reconstruction in Chapter IV and the analytical synthesis in Chapter V.1 offer

new insights into how self-reinforcing mechanisms develop, how agency becomes patterned along evolving practical demands, and how feedback processes jointly structure the emergent trajectory of a path. In doing so, the study responds to several open questions raised in the literature, including the difficulty of understanding “the inherent logic of the self-reinforcing processes,” their limited intentional reproducibility, and the unresolved issue of “how exactly the self-reinforcing processes that led to path dependence can be either interrupted or redirected” (Sydow et al., 2020, pp. 723–724). These findings contribute to an emerging dialogue that seeks to integrate structural and practice-theoretical perspectives on path dependence by grounding the unfolding of self-reinforcement in observable organizational activity. Table 11 provides an overview of the five theoretical implications developed below.

Theoretical Implication	Contribution
<b>(1) SRM as practice effects</b>	Shows that SRM are not autonomous forces but practice-effects emerging from specific constellations and rhythms of the six practices.
<b>(2) Dual feedback logic</b>	Demonstrates that path evolution is driven by two feedback logics: positive feedback stabilizes, while inquiry-based feedback propels progression.
<b>(3) Distributed agency</b>	Reframes agency as shifting organizational attention patterned through changing practice intensities rather than as strong or weak agency.
<b>(4) Stability through transformation</b>	Reveals that stability is not a post-transformation phase, but an emergent

	equilibrium produced through recursive transforming practices.
<b>(5) Lock-in as continuum</b>	Argues that lock-in is rarely absolute, functioning instead as a continuum of practice thickening and cognitive sedimentation.

**Table 11** *Overview of theoretical implications (Own illustration)*

### **(1) Self-reinforcing mechanisms as practice effects**

A first implication concerns the ontological nature of self-reinforcing mechanisms themselves. Earlier research offered powerful explanations of why organizational paths stabilize, drawing on structural arguments about recursiveness, duality of structure and knowledgeability (Schreyögg et al., 2003; Sydow et al., 2009). Yet, despite longstanding debates around weak and strong views of agency (Garud & Karnøe, 2001; Garud et al., 2010) and efforts to integrate these perspectives through Path Constitution Theory (Sydow et al., 2012), the empirical unfolding of self-reinforcement has remained surprisingly opaque. As Sydow et al. (2009, 2020) and Fortwengel & Keller (2020) repeatedly noted, the “theoretical core components” of the process – the emergence, interplay and stabilization of SRM – have not yet been conceptualized in sufficient detail, and the field continues to lack empirical accounts of how everyday activities trigger reinforcing dynamics. This observation echoes Dobusch and Schüßler’s (2013) critique that the literature has tended to conceptualize positive feedback at an abstract level, without specifying how such dynamics materialize through concrete action.

By drawing on Schatzki’s site ontology and its underlying assumptions, as proposed by Kremser and Sydow (2022), this study offers such a perspective. The empirical material shows that self-reinforcing mechanisms

are not autonomous forces but practice effects arising from the recurrent enactment of six practices – Mobilizing, Framing, Inquiring, Innovating, Deciding and Structuring – together with their material arrangements. Chapter IV traces how these practices are linked across time, while Chapter V.1 demonstrates how their recursive coupling generates initiating, redirecting, amplifying and stabilizing effects.

Seen through this lens, self-reinforcement becomes visible as a performative accomplishment enacted by knowledgeable agents and gradually acquiring a recognizable gestalt (Sydow & Schreyögg, 2011): not in the form of abstract mechanisms, but in specific practice constellations and iterational rhythms. Each mechanism unfolds through a distinct, empirically observable sequence of practices. For example, Adaptive Expectations emerge through a rhythm of Mobilizing, Framing, Deciding/Innovating/Structuring and Inquiring, gradually stabilizing expectations while allowing for ongoing refinement. This mechanism-specific sequencing resonates with recent calls to specify the micro-foundations of self-reinforcement (Sydow et al., 2020; Kremser & Sydow, 2022). Path dependence thus materializes not in isolated “mechanisms,” but in practice-nets whose recursive effects give rise to the dynamics we label self-reinforcing. By empirically specifying these rhythms and their evolving patterns, the study extends the path constitution perspective by supplying the micro-foundation that has long been missing.

## **(2) Dual feedback logic – Stabilization through positive feedback, progression through inquiry**

A second implication relates to the internal logic of reinforcement. Classical path dependence theory highlights positive feedback – such as increasing returns, legitimation or network effects – as the central driver of path formation (Arthur, 1989; Dobusch & Schüßler, 2013; Sydow et al., 2009, 2020). The findings of this study confirm the stabilizing role of such effects

but show that they represent only one half of the recursion. Inquiry-based, problem-centred feedback proves to be equally central. As documented in Chapter IV, the Inquiring practice continuously surfaced unresolved issues, inconsistencies and coordination gaps. These '*open construction sites*' did not merely challenge the emerging path but triggered renewed rounds of sensemaking, experimentation and recombination. Such problem signals resemble what Garud and Karnøe (2001) describe as emergent misalignments that initiate renewed search processes, aligning these observations with broader notions of problem-driven adaptation.

In Chapter V.1, these inquiries 'performed' redirecting and amplifying effects across all four mechanisms, particularly in the formation phase. What stabilizes the path is therefore closely intertwined with what progresses it. Rather than a smooth reinforcement spiral, the path is similar to an iterative problem-solving cycle, where consolidation and exploration alternate as actors build on what works and rework what does not.

This perspective complements, rather than contradicts, classical Path Dependence theory. It specifies that positive feedback consolidates viable solutions, whereas inquiry-driven feedback generates progression by exposing what does not yet fit. Together, they create a dual feedback logic that more accurately captures the recursive, evolving nature of path constitution.

### **(3) Distributed agency – attention and energy travelling across practices**

A third implication concerns the nature of agency within path-dependent processes. Rather than fitting neatly into the traditional continuum between a "strong" and a "weak" view (Fortwengel & Keller, 2020; Garud & Karnøe, 2001; Sydow et al., 2009), the findings suggest that agency is best conceptualized as distributed organizational attention, patterned through the intensities of the six practices. Chapter IV shows how actors initially direct

their attention toward Mobilizing and Framing to navigate the strategic vacuum—work that stabilizes interpretive premises and creates a first frame of reference (Koch, 2011; Wenzel, 2015). As demands shift toward problem-solving, Inquiring and Innovating move to the foreground, before Structuring and Deciding gradually consolidate what has been developed.

These temporal shifts, visible in the intensity profiles and effects in Chapter V.1, indicate that agency is not primarily a matter of free choice or structural constraint but a redistribution of attention and energy across practices. Reflexivity remains present yet becomes more constrained as self-reinforcing processes take hold. External lenses – such as the new CEO and the Listening Campaign – temporarily expand reflexive capacity by questioning taken-for-granted premises (Fortwengel & Keller, 2020). However, such interventions remain episodic, while the practices that feed self-reinforcing mechanisms unfold continuously. This temporal asymmetry helps explain why hierarchical decisions cannot override self-reinforcing dynamics in a sustainable way (Petermann et al., 2019). This patterned attention aligns with Giddens' (1984) notion of the reflexive monitoring of action, while extending it by showing how attention becomes channeled through evolving practice intensities rather than remaining an individual-level cognitive process. In this sense, agency is neither suppressed nor dominant: it is patterned, shifting with the evolving practical concerns of the organization. This practice-based view extends existing agency debates by situating agency within the practical nexus through which paths are enacted and reproduced.

#### **(4) Stability as emergent property of recursive transformation**

A fourth implication emerges from understanding how stability itself is produced within the path process. Rather than appearing abruptly in a distinct “lock-in phase”, the findings show that stability develops gradually through the very cycles of transformation that constitute the emerging path.

As detailed in Chapter IV, the new strategy first creates a vacuum marked by uncertainty, ambiguity and competing expectations. Mobilizing and Framing then provide provisional orientation through initiating effects, helping the organization regain its footing in a destabilized environment.

During the subsequent formation phase, the path remains highly loosely configured. Here, Inquiring and Innovating unfold their transforming character most clearly. These practices expose inconsistencies, surface coordination gaps and experiment with alternative configurations, generating redirecting and amplifying effects. Chapter V.1 demonstrates how these effects accumulate over time and gradually move the organization from broad, exploratory problem-solving toward increasingly fine-grained refinement. In this sense, transformation is not a phase preceding stability – it is the practical mechanism through which stability becomes possible in the first place. Only through the cumulative work of these transformation cycles do Structuring, Deciding and renewed Framing eventually consolidate what has been developed. Their stabilizing effects formalize routines, interfaces and interpretive anchors, restoring organizational balance after the initial rupture. The resulting equilibrium resembles an organizational homeostasis – temporary, negotiated and continually reproduced through practice. This dynamic also aligns with Stache and Sydow (2023), who argue that self-reinforcing mechanisms can simultaneously stabilize and transform practices depending on how they are enacted. The empirical findings support this perspective: the same finite set of practices that initially carry a transforming impulse later generate stabilizing effects. What appears as “transformation” in early iterations becomes “stabilization” in later ones exactly because the underlying effect profile shifts from initiating and redirecting toward amplifying and stabilizing. Stability and change are therefore not sequential stages but mutually constitutive expressions of the same recursive practice system.

This finding challenges the sequential phase logic of the classical model by showing that stability is a practically produced, temporary equilibrium emerging from the cumulative sequence of initiating, redirecting, amplifying and stabilizing effects. Path evolution is therefore an ongoing interplay between transformation and consolidation – and the emergence of stability cannot be separated from the transforming work through which the path is continuously enacted.

#### **(5) Lock-in as continuum of practice thickening and cognitive sedimentation**

Finally, the findings invite a reconsideration of how lock-in should be conceptualized. Although the temporal scope does not allow observing a full lock-in, the intensity patterns in Chapter V.1 offer theoretical insights. No practice falls to zero intensity and especially Inquiring and Framing remain active even as stabilization increases. Combined with evidence that narratives, evaluative premises and shared mental models embed paths more deeply than formal structures (Koch, 2011; Wenzel, 2015), this suggests that organizations may seldom reach a state of complete closure. Instead, they stabilize into high-stability equilibria that resemble “late-formation” states. This interpretation aligns with Sydow et al.'s (2012) notion of soft lock-ins, in which dominant solutions become highly reproduced yet remain reversible if sufficient reflexivity and energy are mobilized. It also supports Vergne and Durand's (2010) critique of deterministic understandings of path dependence, showing that multiple trajectories remain possible even under conditions of strong stabilization. In addition, the rarity of empirically observed full lock-ins (e.g., David's 1985 analysis of QWERTY) further illustrates that theoretical lock-in often functions as an ideal type rather than a common empirical endpoint. It also echoes Pettigrew's (1990) temporal perspective, which sees organisational trajectories as evolving, open-ended processes rather than sharply

segmented phases. The findings therefore shift the understanding of lock-in from a binary end state to a continuum of practice thickening and cognitive sedimentation, raising the broader theoretical question of whether fully developed lock-ins are empirical anomalies rather than typical outcomes.

### **V.3 Managerial Implications**

The findings of this study offer several implications for managers who seek to understand how organizational paths take shape and how their underlying dynamics can be manipulated in favor of the individual aim. Because self-reinforcing mechanisms emerge from practical activity rather than abstract forces, the managerial task becomes to shape the conditions under which practices unfold, gain traction and recursively stabilize. These insights unfold across three interconnected areas of managerial concern: structuring the early vacuum, calibrating inquiry while sustaining mobilization, and guiding the pace of development.

First, the study highlights the importance of recognizing and deliberately orchestrating the vacuum that opens at the beginning of any major transformation. As existing routines loosen and expectations become unsettled, organizations enter a phase in which many old and new interpretations coexist with a different stabilizing force. Rather than filling this vacuum with surface-level communication or rigid plans, managers should establish early orientation points through Mobilizing and Framing work. This early work also creates the reflexive distance needed to reconsider existing assumptions before new ones begin to settle. Furthermore, these practices provide interpretive anchors that shape initial expectations and prevent the organization from settling on a solution that is too narrow or too loose, which risks to either lock the organization into premature assumptions or to not give enough guidance diluting the transformation goals making it impossible

to develop a new path. Crucially, this early work cannot be treated as a one-off impulse and must be consciously taken into consideration as operational demands will intensify, shifting the organizational focus and agency from interpreting goals of the transformation into executing the developed strategies. Yet the empirical findings show that sustained mobilization remains essential for keeping expectations aligned smoothing spikes in inquiries. A further important instrument in orchestrating the vacuum during this phase is the choice of the right incentives to gain momentum. They should not only encompass structural needs, but also enable cognitive clarity, social belonging and meaningful engagement – signaling actors how their contributions connect to the emerging path.

Second, inquiry lies at the heart of progress, yet it is also the organization's most fragile resource. It brings inconsistencies to the surface, exposes coordination gaps and keeps the emerging path adaptive; at the same time, its intensity must be carefully balanced. Too much inquiry throws the organization back into uncertainty reopening the vacuum, while too little inquiry prevents important signals from surfacing, suffocating needed learning cycles. Psychological safety therefore becomes the quiet but essential infrastructure of any transformation: without it, people hold back their concerns that matter – with too much caution, inquiry loses its edge and becomes a form of polite alignment rather than genuine and productive learning. At this point, culture becomes a decisive factor. In the LSC case (as an example), the keen-to-please culture helped to prevent escalation by softening conflicts, yet it also made it easier for teams to avoid raising difficult but crucial issues risking misalignments that normally would require attention. Managers should therefore treat culture as an active variable and pay attention to how silence functions: whether it protects collaboration — or hides issues that need to be addressed. A helpful question is: *What is not being voiced – and why?*

Balancing inquiry also depends on how coordination functions before routines are in place. Early in the process, coordination relies less on formal hierarchy and more on a shared sense of when to explore and when to move things forward – in other words an emerging sense of organizational tempo including a rhythm in which exploration and convergence alternate. Therefore, teams need room and space to articulate issues, work through them and make sense of it together. The capacity to sense when inquiry should deepen and when it should settle becomes less an individual intuition than an organisational sensing practice, shaped by how teams monitor inquiry intensity, interpret subtle signals and adjust their interactions accordingly. This sensing work is inherently reflexive, as it requires stepping back from immediate action to assess how inquiry is unfolding and whether it is beginning to drift.

Within this dynamic, a crucial translational mechanism emerges that is often overlooked: the translational work of middle managers. The findings show how they repeatedly stepped into the role of interpreters, turning broad strategic goals into concrete tasks and explaining what these meant in the context of daily work. This translation work is essential for inquiry to function at all – because inquiry can only be effective when teams know what they are inquiring into. Yet, translation is also vulnerable. Without careful attention, it can slip into a quiet form of organisational “telephone game” where intentions become distorted as they travel across layers. Misaligned translations can steer teams toward solutions built on incorrect assumptions, thereby dulling the organization’s capacity to sense misfits and, in the worst case, driving the emerging path back toward earlier logics.

Finally, the study highlights the importance of managing the pace of transformation so that the organization (or effected entity) develops in a coherent and steady rhythm. Transformation does not unfold in a straight line but through shifting patterns of initiating, redirecting, amplifying and stabilizing effects. Managerial attention must therefore follow these internal

dynamics rather than impose an externally defined pace. Recognizing when the organization is ready to consolidate emerging insights and when it still needs further inquiry or exploration becomes central to ensuring that momentum is neither stalled nor forced prematurely.

As these dynamics unfold, the cadence of decisions gains particular significance. In hierarchical settings, long gaps between decision moments can slow development because managerial interventions are episodic, while self-reinforcing practices continue to operate in everyday work. When decision cadence and practice rhythms drift apart, the organization loses alignment. To prevent this, managers may need to redistribute certain decision rights, increase the frequency of decision forums or adapt coordination interfaces so that decisions are made in step with the evolving rhythm of inquiry and innovation.

These temporal considerations also relate to the risk of narrowing the organization's interpretive space too early. Because cognitive inscription stabilizes faster than structural routines, organizations can easily settle into early assumptions that later become more difficult to revise. Periodically reopening interpretive space, whether through reframing sessions, external insights or reflective conversations, helps maintain adaptability and preserves the possibility of redirection even within stabilizing configurations. Such reflexive interruptions prevent the organization from slipping back into prior logics simply because they are cognitively more familiar. At the same time, managers must remain attentive to how quickly old habits can reassert themselves. As mobilization fades and stabilizing routines take hold, the organization may drift back toward familiar ways of thinking and acting. Keeping a modest level of inquiry alive help creating regular opportunities to question assumptions helps guard against these subtle returns to the old path.

Taken together, these implications suggest that managers do not steer mechanisms directly. Instead, they shape the practical conditions under

which mechanisms emerge, since these mechanisms are not independent forces but effects of constellations of practice. What managers can steer are the practices themselves, which give rise to these effects. This requires reflexivity that enables alternative ways of acting and interpreting the situations at hand. Managing emerging paths therefore means engaging with the evolving interplay of the six presented practices – Inquiring, Innovating, Framing, Deciding, Mobilizing and Structuring – creating the spaces, rhythms and conditions in which recursive practice can lead the organization toward a path that is both coherent and capable of renewal. In addition, managers must remain attentive to the subtle gravitational pull of prior paths. As mobilization fades and stabilizing practices intensify, organizations risk sliding back into familiar cognitive and behavioral patterns. Keeping a modest level of inquiry alive and periodically reopening interpretive space serves as a safeguard against such relapses, ensuring that the emerging path does not quietly bend back toward earlier logics.

## **VI CONCLUSION**

After outlining the research topic, developing the theoretical and conceptual basis, and describing the methodological approach, the empirical results were presented and discussed in relation to existing research. This forms the foundation for the concluding remarks of the study. The following chapter brings the insights from the previous sections together and reflects on them in a broader perspective. It begins with a summary of the findings and an answer to the central research question (VI.1), followed by a discussion of the study's limitations (VI.2) and closing it with suggestions for future research (VI.3).

### **VI.1 Comprehensive Summary of the Findings**

The aim of this dissertation was to expand the field of organizational path dependence by examining how self-reinforcing mechanisms unfold in practice. Over recent decades, the research landscape has shifted markedly from deterministic accounts toward a constructivist ontology that highlights situated action, reflexivity, and the evolving debate on agency (Kremser and Sydow, 2022; Stache & Sydow, 2023; Sydow et al., 2020). This development broadened the theoretical lens and opened questions about how actors participate in shaping, sustaining, or redirecting organizational paths. Yet, despite important advances on topics such as path breaking (Fortwengel and Keller, 2020; Petermann, 2019; Sminia, 2024; Stache and Sydow, 2023), instruments for monitoring and analyzing path processes (Schreyögg, 2014; Sydow, Windeler, Müller-Seitz & Lange, 2012), and conceptual elaborations often informed by Giddens's structuration theory (Schreyögg and Sydow, 2011; Kremser and Sydow, 2022), the micro-foundation of the very mechanisms at the heart of the theory remained underexplored. Prior research has discussed what self-reinforcing mechanisms are but has not

clarified how they actually take shape in daily organizational practice. This gap motivated the overarching research question of this dissertation: **“How do self-reinforcing mechanisms develop and remain in force?”**

To address this question, the study adopted a qualitative single-case design with ethnographic elements at LSC, a multinational logistics and storage company undergoing a major transformation under a newly appointed CEO. The transformation context, and especially the Blend Initiative (BI), provided a rare empirical opportunity to observe how self-reinforcing mechanisms begin to form during the early phases of path development. The combination of historical depth, real-time immersion, and temporal bracketing made it possible to reconstruct how emerging practices gradually formed recognizable patterns of momentum and stability.

The analysis identified six practices that consistently shaped how actors at LSC navigated the transformation: framing, inquiring, innovating, structuring, deciding, and mobilizing. These practices appeared across meetings, informal interactions, and decision arenas. They were the concrete doings and sayings through which ambiguity turned into coordinated action, and coordinated action into routines that over time began to sediment into patterns. Based on these six practices, the study was able to specify the practical sequences that underlie each of the four self-reinforcing mechanisms defined in the theory of organizational path dependence. Adaptive expectations followed a recurring rhythm of mobilizing, framing, innovating (deciding, structuring) before looping back into inquiring. Coordination cycles emerged around deciding, framing, innovating, structuring, and subsequent inquiring. Learning unfolded mainly through framing, innovating, and inquiring. Complementarity took shape through innovating, framing, structuring, and inquiring. These patterns did not occur in isolation. Instead, they formed intertwined and mutually reinforcing cycles that shared a similar temporal logic. Sometimes they unfolded sequentially, sometimes in parallel, often overlapping in ways that

linked their internal rhythms. Across these cycles, positive feedback tended to stabilize emerging patterns, while negative feedback in the form of inquiring did not interrupt but rather progressed the process forward. Inquiry therefore functioned as a central driver of movement, ensuring that early stabilization did not translate into premature rigidity.

In sum, these findings offer several contributions to organizational path dependence theory. Building on the derived intensity argument and the effects argument – the first showing that practices rise and fall in intensity across phases, and the second explaining how their shifting combinations initiate, amplify, redirect or stabilize a path – it becomes possible to specify more precisely how self-reinforcing mechanisms unfold in practice. These two interpretative insights form the basis for five central contributions that extend the existing literature.

First, the study demonstrates that self-reinforcing mechanisms are practice-effects rather than autonomous forces, emerging from specific constellations and temporal rhythms of the six practices. They gain shape not through abstract mechanism logic but through situated enactments that repeat, overlap, and accumulate.

Second, the analysis reveals a dual feedback logic in path evolution, in which positive feedback stabilizes emerging patterns while inquiry-based feedback pushes the process forward. Reinforcement is therefore not purely consolidating but depends on the ongoing interplay between consolidation and constructive irritation.

Third, agency can be understood as shifting organizational attention structured through changing practice intensities, rather than through the dichotomy of strong versus weak agency. This perspective embeds agency directly in the patterned performance of practices.

Fourth, stability emerges through transformation rather than after it, as an equilibrium produced by recursively enacted practices that simultaneously

stabilize and alter the developing path. In this sense, stability and change stem from the same practical work.

Fifth, the findings show that lock-in appears as a continuum of practice thickening, resource coupling, and cognitive sedimentation rather than a binary state. This explains why organizations may develop strong stabilizing tendencies without fully closing off alternative courses of action.

## **VI.2 Study Limitations**

The present study, like any qualitative and theory-informed inquiry, is subject to several limitations. These arise along three interrelated dimensions: the theoretical and conceptual choices that guided how the phenomenon was approached, the methodological decisions that shaped how the material was analyzed, and the contextual conditions under which the observed dynamics unfolded. While these aspects inevitably place boundaries around what the study can claim, they help clarify the scope within which the findings should be interpreted.

Regarding the theoretical and conceptual side, the analysis builds on a specific combination of organizational path dependence and a practice-based lens. This choice makes it possible to access early reinforcing dynamics with a high degree of granularity, but it naturally emphasizes certain facets while leaving others more peripheral. Perspectives such as routine dynamics or institutional logics might have highlighted different mechanisms or tensions. The account developed here should therefore be understood as one theoretically grounded way of making sense of the phenomenon, not the only possible one. The temporal reach of the study provides another conceptual boundary. The analysis follows the emergence of reinforcing dynamics in vivo, which extends beyond much of the retrospective work in the field. Yet it still captures only an early segment of

the broader process. Later developments – such as the potential move toward a lock-in – remain outside the empirical window. The findings thus illuminate how reinforcing dynamics begin to build momentum, but they cannot yet speak to how these dynamics will unfold over longer horizons. A further limitation relates to the empirical visibility of the mechanisms themselves. By translating them into bundles of practices, the study responds to a longstanding challenge in path research. At the same time, this visibility is tied to the particular constellation of LSC and the specific moment of transformation. Whether similar patterns would appear in other settings, or in later phases, remains an open question. The present findings should therefore be read as an empirically grounded proposal rather than a definitive map of mechanism formation.

Methodologically, the study is shaped by the interpretive nature of qualitative research. Approaches such as inductive coding and temporal bracketing offer a structured way of linking empirical material to conceptual abstraction, yet they also require decisions about boundaries, categories and temporal segmentation. These choices inevitably influence how the dynamics appear and how strongly certain patterns come into focus. While such interpretive work is inherent to the method, it means that alternative analyses might have emphasized slightly different aspects. The single-case design provides another methodological consideration. The LSC case offers unusually rich access and allows the reconstruction of dynamics that are otherwise difficult to observe closely. At the same time, a single organizational setting cannot reflect the full range of possible trajectories found in other industries, governance arrangements or cultural contexts. The strength of the case lies therefore in its theoretical insight rather than its generalizability. Moreover, even with a broad empirical base of interviews, observations and documents, access conditions shape which voices and perspectives become visible. Actors less directly involved in the transformation, or more skeptical of it, appear less prominently. This does

not undermine the overall patterns but indicates where additional work could enrich the picture.

The final set of limitations arises from the contextual conditions of the case. The findings are tightly intertwined with LSC's cultural and structural characteristics. The safety orientation, long tenure and "keen-to-please" interaction style all shaped how practices took form and how reinforcing dynamics gained momentum. These features contribute to the analytical clarity of the case but also distinguish it from more fragmented, competitive or decentralized organizational environments. The transferability of the findings therefore requires some caution. The study also follows the organization at a particular moment: an early-stage renewal path characterized by openness, reflexivity and a willingness to question existing routines. It does not examine a mature lock-in or crisis situation, where reinforcing dynamics may unfold under narrower constraints. The trajectory observed here thus reflects the conditions of a setting that is still relatively malleable. Finally, LSC's hierarchical decision structure and the cadence of its leadership processes influenced the rhythm with which practices interacted. In organizations with flatter structures or more distributed decision-making, these temporal patterns may look quite different. The case therefore provides one configuration among many possible ones, shaped by its specific organizational architecture.

### **VI.3 Suggestions for Future Research**

The present study sets out to make the formation of self-reinforcing mechanisms empirically accessible by examining how they take shape through concrete practices. This perspective does not only broaden the understanding of how reinforcing dynamics emerge in organizational life, but it also opens several promising directions for further research. The following

suggestions outline areas in which the field might continue to develop, building on the insights gained here while addressing aspects that lie beyond the empirical scope of this dissertation.

One area for further work relates to the practical and managerial implications that arise once mechanisms are understood as bundles of practices. If reinforcing dynamics grow out of specific patterns of action, then organizations may, at least in principle, be able to influence these patterns more deliberately. This raises questions about how interventions could be designed at different stages of a path: what kinds of actions are helpful when practices are still taking shape, and what becomes important later on, when routines have become more established? It also invites further investigation into how managerial routines themselves participate in reinforcing dynamics, and under which conditions attempts to adjust or redirect these routines lead to strengthening, weakening, or transforming the mechanisms at play. A more nuanced understanding of these practical dynamics would help clarify how organizations can work with the recursive nature of reinforcement when navigating strategic renewal, rather than acting against it or outside of it.

A second direction follows from the observation that the four mechanisms do not unfold with equal intensity over time. Although all mechanisms are set in motion from the outset, their development is far from uniform. In the early stages of the case, adaptive expectations and coordination responded strongly to mobilizing, framing and deciding, while complementarity developed more gradually and only gained traction once emerging structures, shared tools and tangible innovations began to support it. Learning, by contrast, appeared as the cognitive hinge that connects and underpins all four mechanisms. These dynamics suggest that the mechanisms differ not only in their internal logic but also in the extent to which they exert influence at different moments of a path. Future research could therefore explore how the relative significance of the mechanisms evolves over longer time spans, which mechanism tends to dominate under

which conditions, and which are more resistant – or more susceptible – to change. Such work would help clarify whether the shifting intensities observed here represent a broader pattern of mechanism development or a context-specific constellation.

A third avenue concerns the co-evolution of contextual conditions and reinforcing dynamics. The study shows that hierarchy, communication patterns and operational logics do not merely form a static background to the process but shift – subtly yet noticeably – in interaction with the very practices that constitute the mechanisms. Hierarchical decision rhythms, for example, shaped how coordination could stabilize, while the “keen-to-please” culture influenced how inquiry was voiced and taken up. At the same time, emerging practices began to reshape how decisions were made, how information travelled, and how roles were interpreted. This reciprocal movement suggests that context and mechanisms evolve together rather than in isolation. Future research could examine how decision structures adapt – or resist adaptation – once reinforcing dynamics begin to intensify, how new coordination rhythms take form while older logics still operate, and how “self-practices” such as feedback routines or authority patterns evolve in tandem with more visible practice configurations. Such work could contribute to a more dynamic understanding of context within path research, moving beyond a static backdrop and toward a co-constitutive element of the reinforcing process.

A further area concerns the development and role of reflexivity within reinforcing dynamics. The case suggests that reflexive action depends on actors’ ability to recognize the patterns through which mechanisms unfold, and that such recognition emerges gradually as the mechanisms themselves become more visible. Reflexivity is therefore not a given, but a capability that appears to grow alongside awareness of the reinforcing logic. This invites future work on how reflexive capacity develops within organizations, which conditions enable temporary interruptions of reinforcing sequences, and how

reflexivity might be observed empirically or even assessed systematically. By linking 'mechanism-based' theorizing with the micro-dynamics of sensemaking and noticing, such research could enrich our understanding of how organizations maintain room for maneuver within processes that tend toward stabilization.

Another possible direction involves reflecting on the process model of path dependence. The findings indicate that stability and change do not unfold as clearly demarcated phases but coexist and interact throughout the development of a path. Mechanisms do not "switch" from one phase to the next; rather, they oscillate, intensify, loosen, and sometimes reverse, without aligning neatly with the sequence from preformation to formation to lock-in. This raises the question of whether the classical three-phase model fully captures the empirical complexity of organizational paths or whether a more fluid conceptualization – one that treats consolidation as a gradual thickening rather than a sharp transition – might be more appropriate. Future research could examine the extent to which the established phase structure serves as a useful heuristic or whether it may require refinement in light of more fine-grained, practice-based observations.

Finally, comparative and multi-case research represents a valuable opportunity to assess the robustness and transferability of the patterns observed here. Studying organizations with distinct governance forms, cultural profiles, degrees of digital maturity or environmental pressures could help clarify which aspects of mechanism formation are context-dependent and which may generalize across settings. Multi-case and even cross-sector designs could shed light on whether the temporal rhythms identified in this study recur in other organizational environments or vary systematically with structural or cultural conditions. Such work would deepen the empirical foundation of mechanism-based theorizing and offer a more complete picture of how reinforcing dynamics evolve across different organizational landscapes.

To put it into a nutshell, these avenues illustrate that this dissertation opens various paths for future inquiry rather than offering a closed account. Once self-reinforcing mechanisms are examined as lived, observable practice patterns, the field reveals a richness that invites continued exploration. Further research along these lines has the potential to refine core assumptions of path dependence theory, strengthen its empirical grounding, and expand its relevance for understanding how organizations reproduce and transform themselves over time.

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