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Entrepreneurship across Sociocultural Contexts: Empirical and Theoretical Perspectives

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Entrepreneurship across Sociocultural Contexts

Empirical and Theoretical Perspectives

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Résumé

L’entrepreneuriat est un processus fortement contextualisé. Néanmoins, la grande majorité des études en entrepreneuriat se sont concentrées sur un contexte occidental (notamment aux Etats-Unis), résultant ainsi en une vision biaisée du comportement entrepreneurial à travers le monde. De plus, les théories issues de la psychologie conventionnelle expliquant le développement des caractéristiques individuelles et des différentes visions du monde—ayant des implications importantes pour la création d'entreprises—ont montré une transférabilité limitée pour les quatre-vingt-huit pourcents de la population mondiale n’appartenant pas à une société occidentale, instruite, industrialisée, riche et démocratique. Une grande partie de cette variation dans les processus sociaux n'a pas encore été explorée dans les études d'organisation, résultant en une compréhension fortement limitée des vastes activités de création d'entreprises qui se déroulent à l'échelle mondiale. Contribuant à une compréhension plus nuancée de l'entrepreneuriat, cette thèse propose deux études empiriques contextualisées et une revue des principales approches de l'étude des organisations, de leurs fondateurs et de leurs membres à travers divers contextes socioculturels.

L'Étude I, étude qualitative réalisée par Foy et Gruber, développe et présente la théorie de l’alignement identité-société—Identity-Society Alignement Theory (ISAT) en anglais—pour expliquer comment les décisions clés des entreprises sont façonnées par la dynamique produite lorsque l’identité des entrepreneurs interagit avec la structure sociale environnante. Sur la base de 50 entretiens approfondis avec des entrepreneurs taïwanais, nous montrons que l'alignement—ou le désalignement—entre la structure identitaire d'un entrepreneur et la structure sociale perçue de son environnement produit des tensions ou un renforcement pour l'individu, qui influencent son attitude globale envers la création d'entreprise. Ces attitudes façonnent fondamentalement l'orientation stratégique du fondateur, ainsi que l'offre, la production et la distribution. Cette étude permet d’étendre la théorisation sur l'identité du fondateur et de discuter des limites de la théorisation fondée sur un seul contexte socioculturel ou une seule période de l'histoire.

L'Étude II, revue de la littérature en psychologie des diverses approches pour l'étude de la culture, présente quatre approches packagées que les chercheurs en management peuvent adopter dans leurs études des phénomènes organisationnels. Des preuves évidentes d'une grande variation des orientations psychologiques à travers les cultures appellent à des études plus approfondies et plus globales des organisations—en particulier, la façon dont elles sont fondées et dirigées—à la fois entre et au sein des contextes culturels. Cependant, la diversité des conceptualisations de la culture et des directives pour son étude créent une barrière à l'entrée considérable pour les chercheurs en management qui souhaitent effectuer un travail rigoureux. Dans cette étude, nous abordons les éléments clés des différentes approches disponibles, en soulignant que chaque approche implique un « package » d'hypothèses philosophiques et méthodologiques, en présentant les mérites et les limites de chacun, et en fournissant des exemples de la façon dont les chercheurs en management

peuvent utiliser chaque approche packagée pour étendre les théories des organisations.

L'étude III, étude qualitative réalisée par Bergamini, Foy et Gruber, examine l’entrepreneuriat dans le contexte de grands défis sociétaux (“grand challenges”)—un contexte caractérisé par une grande complexité, nécessitant des solutions ayant un impact élevé et étant hautement évolutives qui engagent généralement de multiples acteurs institutionnels. L'implication de fondateurs célèbres (par exemple, des leaders d'opinions) dans l'élaboration de solutions et de projets visant à relever de grands défis a été un sujet de désaccord au sein de la communauté de chercheurs, avec peu de travaux empiriques. Dans une étude longitudinale et approfondie du fondateur célèbre suisse Bertrand Piccard et de la Fondation Solar Impulse, nous découvrons l'hybridité latente en jeu alors que l'organisation accélère sa mission durable avec la marque de son fondateur célèbre, une marque qui nécessite d'être maintenue dans le temps afin de fournir un soutien continu à l'organisation. Nous affinons le concept d'hybridité latente et développons un modèle d'éveil organisationnel et de réponse à l'hybridité latente, étendant la documentation sur l'organisation hybride ainsi que l'entrepreneuriat dans le contexte de grands défis.

Les trois études de cette thèse, combinées, élargissent considérablement la compréhension de l'entrepreneuriat dans des contextes socioculturels, apportant un éclairage supplémentaire sur la position de l’entrepreneur en société et révélant des schémas dans la manière dont les sociétés en évolution, en tant que toile de fond de la création d'entreprise, influencent la nature-même de ce processus et ses acteurs. Les implications théoriques et pratiques de ces études ouvrent la voie aux futures pistes de recherche autour de la contextualisation de l'entrepreneuriat.

MOTS-CLÉS : identité du fondateur, structure sociale, contexte socioculturel, hybridité latente, psychologie culturelle, business et société, analyse qualitative

Abstract

Entrepreneurship is a highly contextualized process. Yet, the vast majority of entrepreneurship research has focused on Western contexts (notably the United States), thereby yielding a skewed picture of entrepreneurial behavior around the world. Moreover, theories of mainstream psychology explaining the development of individual characteristics and worldviews—which have important implications for venture creation—have shown limited transferability to the eighty-eight percent of the world's population that does not inhabit Western, Educated, Industrialized, Rich, Democratic societies. Much of this variation in social processes has yet to be explored in organization studies, meaning that our understanding of the vast firm creation activities taking place globally is sorely limited. Contributing to a more nuanced understanding of entrepreneurship, this thesis offers two contextualized empirical studies and a review of the main approaches to studying organizations, their founders and members, *across* sociocultural contexts.

Study I, a qualitative study by Foy and Gruber, develops and presents the Identity-Society Alignment Theory (ISAT) to explain how key venture decisions are shaped by the dynamics produced when entrepreneurs' identities interact with the surrounding social structure. Based on 50 in-depth interviews with Taiwanese entrepreneurs, we show that the alignment—or misalignment—between an entrepreneur's identity structure and the perceived social structure of their environment produces tensions or reinforcement for the individual that frame their overarching attitude toward firm creation. These attitudes fundamentally shape the founder's strategic orientation, offer, production, and distribution. With this study, we extend theorizing on founder identity and discuss the limitations of theorizing based on a single sociocultural context or a single period in history.

Study II, a review of the psychological literature's various approaches to studying culture, presents four packaged approaches that management scholars may adopt in their studies of organizational phenomena. While compelling evidence of wide variation in psychological orientations across cultures calls for deeper and broader studies of organizations—particularly how they are founded and led—both within and across cultural settings, the diversity of conceptualizations of 'culture' and directives for its study create considerable barriers to entry for management scholars aiming to do rigorous work. In this study, I discuss key elements of the various approaches available, emphasizing that each approach entails a "package" of philosophical and methodological assumptions, presenting the merits and limitations of each, and providing examples of how management scholars may employ each packaged approach to extend theories of organization.

Study III, a qualitative study by Bergamini, Foy, and Gruber, examines venturing in the context of grand societal challenges—a context characterized by high complexity, requiring high impact, highly scalable solutions that generally engage multiple institutional actors. The involvement of prominent founders (e.g., celebrities) in developing solutions and ventures to address grand challenges has been a subject of disagreement among scholars, with little empirical work. In an in-depth, longitudinal study of Swiss celebrity founder Bertrand Piccard and the Solar Impulse Foundation, we discover latent hybridity at play as the organization accelerates its sustainable mission with the brand of its celebrity founder—a brand which requires maintaining over time in order to provide continued support to the organization. We refine the concept of latent hybridity and develop a model of organizational awakening and response to latent hybridity, extending the literature on hybrid organizing as well as entrepreneurship in the context of grand challenges.

Together, the three studies in this thesis expand understanding of entrepreneurship across sociocultural contexts in important ways, shedding further light on the entrepreneur situated in society, and revealing patterns in the way evolving societies as the backdrop of venture creation influence the very nature of this process and its actors. The important theoretical and practical implications of these studies are tied to future research avenues around the contextualization of entrepreneurship.

KEYWORDS: founder identity, social structure, sociocultural context, latent hybridity, cultural psychology, business and society, qualitative analysis

For my brother Jared, one of the deepest thinkers I know.
In honor of your determination and relentless pursuit of understanding.
Your writings are some of the ones I look forward to reading the most.

To those who seek to better understand themselves and those around them,
how we are shaped by forces inside us and around us,
and how all of who we are comes together in what we create.

S. D. G.

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giving me the gift of life, you gave me the gift of absolute certainty in your support and your delight in my discoveries and—often, far-fetched—ideas. And *Dad*, your conviction that “things tend to work themselves out” helped me to enjoy this messy, uncertain process. In some incredible way, together you have managed to give me both the space to spread my wings and fly, as well as the reassurance I did not think I would need. *Toreah*, my idea and creativity wizard, podcasting partner, dream house co-architect—you help give shape and reason to my aspirations in research and beyond. *Chason, Jared, Cole,* and *Raam,* I am so proud of each of you and love that we have shared such different journeys through education and into worklife. I continue to learn so much from each of you! *Katie, Aria, Ryle, Madi* and the *Wolber family*, and my extended *Foy* and *Fowler families*, *Maya* and *Päivi,* I am continuously inspired, delighted, and comforted by our exchanges. To my adoptive families, the *Leboeuf family* in Belgium, the *Kauppi family* and *Virkki family* in Finland, and the globally distributed *Rantasuomela family*: You have given me the feeling of “home” and taken care of me as if I had always been one of your own.

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Preface

"Because I'm curious... and I care."

The words fell out of my mouth before I had time to try to mold them into something academic and elegant. I picked up my bubble tea and sucked sweet, gummy balls of tapioca through the cold metal straw and into my mouth, my eyes looking for a reaction from the petite, red-headed Bulgarian-Australian art curator sitting across from me. I had just arrived in Taipei a few days prior, and while looking for local entrepreneurs selling original products, I had stumbled upon her work on Taiwanese design[1]. Annie was vivacious and kind, and spoke warmly of the designers she had met and the products she had researched. However, she also told me that I was in for a ride. It was going to be an arduous and labor intensive process to collect data here, she warned, and I better be prepared for the challenge.

"Why are you doing this?" she asked bluntly.

Images, sights, and sounds from past work and travels in far flung places—from Nepal to Guatemala to Ukraine to Finland—played out in front of my mind's eye as if compressed into a high speed movie reel. A man fishing with fruit that paralyses fish under the moist jungle canopy in the shadow of a temple at Tikal… Singing along with a jovial Swedish-speaking Finnish men's choir as our ship leaving St. Petersburg eased out of port, past the old steel cranes decorating the skyline and into the windy Baltic sea… Gasping as my friend's foot plunged through a weak spot in the ice during our winter walk on the frozen sea off of Helsinki's coast… Stopping on the way to a house party in Odessa to buy a watermelon out of the back of a semi-truck, from Ukrainian grandmothers sitting nearby in plastic lawn chairs under the golden afternoon sun… The taste of potato pancakes and an "eggs cram bowl" cooked over a yak poop fire—above the tree line at elevation 5,164 meters—in the little Sherpa village of Gorak Shep, as wind whistled through the slats in the wooden structure... I have always wanted to walk in others' shoes, to live a day in their life and understand how they see the world.

The film reel stopped.

"Because I'm curious… and I care," I responded, almost more as a question than a statement.

"There, that's your mantra. Now write it down, and don't forget it."

So I did. In my field notes—TAV Café, July 11, 2017, 16:00—these words are neatly printed in small letters, alongside other data waiting to be coded. As if I needed to revisit and think about them and how they fit into the bigger picture. It was my truth, but I wasn't ready to fully endorse those words yet. They didn't seem important enough, visionary enough, theoretically motivated enough. Is this a sufficient motivation, I thought? Will I really make it through this PhD journey if this is "all" I have to fall back on?

[1] Ivanova (2017)

I would come to discover that curiosity and caring are powerful. More powerful than any single theory or any specific professional goal. And when an analysis seemed to fall apart and the golden thread was lost and weeks of work appeared to have been unfruitful, curiosity and caring turned out be what kept me going.

Bangkok, January 3, 2020

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Abbreviations

CCIO/OB	cross-cultural industrial/organizational behavior
CCP	cross-cultural psychology
GCs	grand challenges
IP	indigenous psychology
SIF	Solar Impulse Foundation
WEIRD	Western, Educated, Industrialized, Rich, Democratic

List of Publications & Conference Presentations

PEER REVIEWED PAPERS

Foy, S. & Gruber, M. [Title redacted.] Revise and resubmit at *Academy of Management Journal.*

PRESENTATIONS

Foy, S. "The Shifting Philosophical Foundations of (Cross-)Cultural Research: What 'One Mind, Many Mentalities' means for Organization Scholars." Accepted for presentation at the *First Colloquium on Philosophy and Organization Studies (PHILOS), Affiliated with the International Symposium on Process Organization Studies*, Rhodes, Greece: June 2020. Conference canceled due to Coronavirus.

Bergamini, E., **Foy, S.,** and Gruber, M. "From Vision to Action: How Employees Struggle to Enact the Promises of a Visionary Heropreneur." Accepted for presentation at the *Babson Entrepreneurship Research Conference*, Knoxville, USA: June 2020. Conference canceled due to Coronavirus.

Foy, S. & Gruber, M. "Under the Eastern sun: Expanding the Horizons of Founder Identity Research." *Asia Academy of Management Annual Meeting,* Bali, Indonesia: June 2019.

Foy, S. & Gruber, M. "Under the Eastern sun: Expanding the Horizons of Founder Identity Research." *Babson College Entrepreneurship Research Conference*, Waterford, Ireland: June 2018.

Foy, S. & Gruber, M. "Expanding the Horizons of Founder Identity Research." *Academy of Management Paper Development Workshop,* Toulouse, France: April 2018.

Chapter 1

Introduction

Entrepreneurship is a highly contextualized process. Over the past decade in particular, scholars have begun to explore the embeddedness of entrepreneurs and their ventures (Baker & Welter, 2018, 2020; Dencker et al., 2019; Garud et al., 2014; Gehman & Grimes, 2016; Welter, 2011; Yousafzai et al., 2019). A number of relevant contextual dimensions have been identified as setting boundary conditions for entrepreneurs' behavior, including historical, institutional, temporal, spatial, and social contexts (Welter, 2011), which can be summed up in the concept of sociocultural context—the social environment of a given place at a specific point in time as a product of its cultural and institutional inheritance.

Yet, the vast majority of entrepreneurship research has focused on Western contexts (notably the United States), thereby yielding a skewed picture of entrepreneurial behavior around the world. Moreover, theories of mainstream psychology explaining the development of individual characteristics and worldviews—which have important implications for venture creation—have shown limited transferability to the *eighty-eight percent* of the world's population that does not inhabit Western, Educated, Industrialized, Rich, Democratic (WEIRD[2]) societies (Henrich et al., 2010). Much of this variation in social processes, including "visual perception, fairness, cooperation, spatial reasoning, categorization and inferential induction, moral reasoning, reasoning styles, self-concepts and related motivations" (Henrich et al., 2010: 61), has yet to be explored in organization studies, meaning that our understanding of the vast firm creation activities taking place globally is sorely limited.

In other words, we know that sociocultural context holds important implications for the opportunities available to entrepreneurs, as well as for the way they view themselves, others and the world, yet it remains to be understood *how* contextual factors influence entrepreneurs and the specific outcomes these have for their venture-related decisions. How do attitudes toward venture creation vary across sociocultural contexts? Are entrepreneurs across contexts driven by similar or different ranges of motivations? How do nascent entrepreneurs determine what goals are legitimate for an organization? Is this

[2] In line with Henrich and colleagues' (2010) coining of the term 'WEIRD', the acronym is meant to allude to the "exceptional nature" of the sample and does "not intend any negative connotations or moral judgments" (p.83).

bounded culturally? These are the types of questions that remain open for investigation by entrepreneurship scholars.

Sociocultural Context

Sociocultural context[3], has been defined as the "unwritten, decentralized 'rules of the game'" (York & Lenox, 2013: 1930). These unwritten rules are derived from social norms (Acemoglu & Jackson, 2013) and social structures (Fiske et al., 1998; Gergen, 1991; Giddens, 1991), institutions such as faith traditions, formal religions and philosophies (Hwang, 2012; Smith, 1994), education systems (Lee, 2004), even the geography of the places we inhabit (Tuan, 2001). Depending on the factors that a researcher aims to emphasize or investigate, sociocultural contexts are often delimited by *physical space*—e.g., the borders of nations or neighborhoods—that may coincide with *linguistic* or *religious* boundaries—e.g., "the Arab world", or *shared heritage*—e.g. "Chinese societies"—at a given time period.

Contributing to a more nuanced understanding of entrepreneurship, this thesis offers three perspectives on studying entrepreneurs and their ventures within and across sociocultural contexts.

Three Studies from Three Perspectives

Each of the three studies comprising this thesis approach entrepreneurship in sociocultural context from a unique perspective. This section introduces the theoretical perspectives adopted, while a subsequent section will present the specific contexts selected for empirical study.

I : An Identity Perspective

A first perspective is that of *identity*— "a general, if individualized, framework for understanding oneself that is formed and sustained via social interaction" (Gioia, 1998: 19). Identity scholars show that the context in which individuals grow up and form their identities has important implications for the *content* and *structure* of their identities, that is, both the attributes that individuals employ in their self-construal, and the filters used to determine from which experiences to draw those attributes (Côté, 1996; Mead, 1934; Nisbett, 2004).

The influence of a person's identity on his or her behavior as founder, leader, and member of an organization has been illustrated in multiple streams of management literature (Erez & Earley, 1993; Fauchart & Gruber, 2011; Lee, Masuda, Fu & Reiche, 2018; Kish-Gephart & Campbell, 2015). Recent work in entrepreneurship has portrayed entrepreneurs' identities as powerful determinants of their venture creation activities, driving *why* they establish new organizations and affecting *how* those organizations operate (Fauchart & Gruber, 2011; Powell & Baker, 2017; York, O'Neill & Sarasvathy, 2016). A number of studies have begun to examine entrepreneurs' identities as embedded in a larger social context (cf. Anderson, Warren & Bensemann, 2018; Marlow & McAdam,

[3] Also referred to as socio-cultural context or social-cultural context

2015; Muhr et al, 2019). However, findings in one sociocultural context do not always carry over into others (e.g., Sieger et al., 2016). Growing attention to entrepreneurs' identities situated in sociocultural context (Gruber & MacMillan, 2017; Yao et al., 2016) reiterates the timeliness of the present study, which represents one of very few empirical investigations of founder identity outside of a western context. Study I extends the conversation by developing a *theory of identity–society (mis)alignment* based on the alignment—or misalignment—of the way entrepreneurs form a sense of self, with their perceptions of the way their society dictates that self should be formed. The resulting tensions or reinforcement created for the entrepreneur are linked to specific venture decisions.

II : A Methodological Perspective

A second perspective investigates *the act of conducting research* on psychological and behavioral phenomena across sociocultural contexts. While there is recognition of the need for more contextualized work on individuals in organizations, a complex body of literature on culture and psychology, scattered across multiple domains of the basic sciences, represent a considerable barrier to entry for management scholars. Study II responds to this situation by summarizing multiple approaches that management scholars can adopt in designing and conducting contextualized organizational research. While the aim is to ultimately provide insights on the *practice* of conducting research, these practices are derived from an examination of philosophical assumptions behind main approaches to studying the relationship between individuals and their sociocultural context.

More specifically, four approaches to studying culture and psychology are outlined, based on their conceptualization of "culture" (i.e., assumptions about its locus and scope) and assumptions about whether cultures are comparable on pan-cultural dimensions—or rather closed, solely self-interpreting systems. The four approaches introduced represent a comprehensive summary of the main philosophical underpinnings and associated methodologies employed in cultural psychology, cross-cultural psychology, and indigenous psychologies (Greenfield, 2000; Jahoda, 2012; Hwang, 2012; Eckensberger, 2015; Singelis, 2000; Hofstede et al., 2010; Shweder et al., 2006).

III : An Organizational Hybridity Perspective

A third perspective considers a form of organizational hybridity that has received little empirical attention. Hybrid organizations are characterized by the combination of multiple goals, identities, or logics (Battilana & Lee, 2014). Prior work has generally assumed that both sides of the hybridity in a dual mission organization are explicit and understood among organizational members, and exceptions to this unstated assumption have been carefully documented (cf. Pratt and Foreman 2000:20; Seibel, 2015). Study III investigates a case of *latent hybridity,* that is, organizational hybridity in which one element is only implicit (Seibel, 2015).

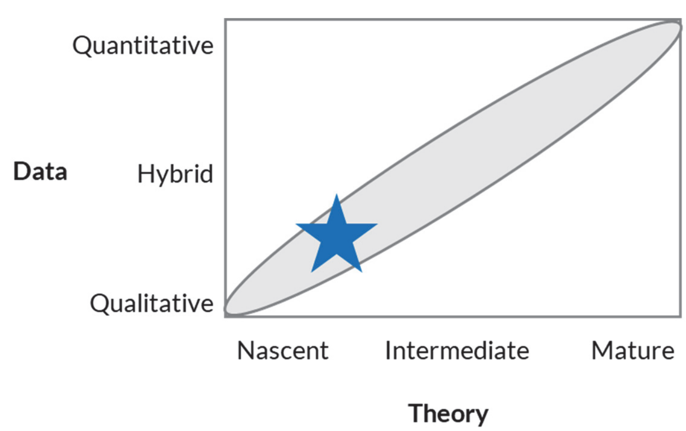
Much of the extant work on organizational hybridity is dedicated to understanding how such organizations can cope with, manage, balance or prioritize elements of their hybridity, and how they can sustain operations while balancing elements that appear contradicting or paradoxical (Ashforth & Reingen, 2014; Battilana & Dorado, 2010; Pache & Santos, 2013; Smith & Besharov, 2019; Skelcher & Smith, 2016; Thornton et al., 2012; Zahra, 2009). My coauthors and I investigate a case wherein the elements of hybridity are mutually reinforcing, rather than paradoxical. However, the implicitness of one element of the hybridity gives rise to challenges that other explicitly hybrid organizations have faced. We discuss organic, bottom-up action on the part of team members who create *informal guardrails* (cf. formal guardrails, Smith & Besharov, 2019), and discuss the important role of dual mission synergies in sustaining operations within a latent hybrid organization.

This study illustrates how particular contextual factors—namely, venturing led by a celebrity founder, in a "grand challenge" context—are particularly suited to creating extreme cases (Eisenhardt, 1989) to illuminate novel phenomena.

Overview of Methods

The thesis entails one literature review and two empirical studies, which are both qualitative in nature. A qualitative approach is particularly appropriate when theory in a domain is nascent to intermediate, and when the goal of a study is to *understand*—resulting in the generation of ideas, hypotheses, and theory building—rather than to predict, test, or verify (Edmondson & McManus, 2007). Given the exploratory investigations of founder identity outside of a western context, and of a novel type of organizational hybridity, both of the empirical studies in this thesis lent themselves to qualitative, inductive approaches. Both of these qualitative studies contribute to theory building in literature streams—namely, founder identity and hybrid organizing—which have emerged in the past decade and represent (from an academic, empirical perspective) rather new phenomena which we have yet to fully understand.

1.1. Methodological Fit As a Mean Tendency (adapted from Edmondson & McManus, 2007:1168)



Selection of Research Contexts

Given the central focus of this thesis on the role of context in entrepreneurship, significant care was given to selecting the research contexts for the two empirical studies, as well as delimiting the referential context for the conceptual study.

Study I: Taiwan

Selecting a research context for this study was undertaken very methodically. With the broad aim of the study being a greater understanding of how culture affects founder identity, and a particular interest in an East Asian context, I began screening country profiles. I intended to select a setting that was significantly different from Western countries on multiple dimensions, so as to enter an extreme setting (Eisenhardt, 1989)—at least from the perspective of the researcher—in order to make salient themes more identifiable. One dimension used to identify such an extreme setting was that of *individualism* and *collectivism* (Markus & Kitayama, 1991), describing, respectively, Western cultures' "faith in the inherent separateness of distinct persons" (p.226) and many non-Western cultures' insistence on "the fundamental connectedness of human beings to each other" (p.227). Hofstede (1984) operationalized these constructs in his cultural values scale, which have since been used to evaluate individuals' construal of self and others, aggregated into nation-level scores (Hofstede Insights, 2017). The United States, at a score of 91, has the highest value on individualism; I began by screening East Asian countries' scores on this value dimension. While mainland China (individualism score of 20) might have otherwise been appropriate, I was concerned that the communist government regime would weigh heavily on entrepreneurs' perceptions of their sociocultural context, and my goal was not to study the influence of political context. Similarly, Thailand had a sufficiently different individualism score (20), but, as a kingdom that has never been colonized by a foreign power, it is a unique case in Southeast Asia (Rush, 2014). Indonesia, with the lowest individualism score in the region (14), was also considered; however, in a similar vein, I felt that being a predominantly Muslim country might limit the generalizability of the results to otherwise similar nations in the region. (Ultimately, the inductive study would lead us to investigate perceived social structures that extend beyond particular cultures, thus reducing the regional generalizability concern.) The island of Taiwan was the best fit: On Hofstede's cultural values scale, its score for individualism is 17, extremely different from the United States' at 91.

Two additional factors emerged during fieldwork and analysis, confirming Taiwan's attractiveness as a research context and providing cornerstones for our contribution with the study. First, having evaded the 1960s-70s cultural purge of the Cultural Revolution in mainland China, Taiwan embodies a rich appreciation for, and preservation of, traditional Confucian values. Second, as a transitional context characterized by political and economic change (Buzan & Zhang, 2014; Lee, 2004) and the sociocultural shifts these provoke, Taiwan provided the unique opportunity to observe (perceptions of) multiple social structures within a surprisingly small geographical area sharing the same history.

Study II: Non-WEIRD Countries

In this conceptual essay, I draw on comparative research and studies from non-Western, Educated, Industrialized, Rich, Democratic countries. This is an admittedly broad sociocultural context, as non-WEIRD countries house 88% of the world's population (Henrich et al, 2010). Rather than treat a particular sociocultural context, I aim to provoke reflection and discussion on the assumptions we take for granted: assumptions about the universality of psychological findings drawn from Western samples; assumptions about the definition of culture and the comparability of cultures.

Study III: The Era of Grand Challenges

The second empirical study of this thesis is set in an organization created by a celebrity figure to respond to grand challenges (GC) through curating and delivering sustainable solutions to decision-makers. We selected this context for its theoretical relevance—namely, the opportunity to investigate a particular combination of organizational goals—as well as for its practical relevance, allowing us to investigate, in great depth, one way a founder and his or her organization may navigate the sociocultural context of this grand challenge era. In this study, my co-authors and I emphasize the novel aspects of venture creation in a grand challenge context: not only the size and scope of the intractable problems facing humanity as a whole, but also a cultural perspective on GC entrepreneurs' means of marshaling resources for their organization. Heropreneurship and celebrity culture are particularly important in this study, as the maintenance of the founder's personal brand is—in practice though not in word—elevated on par with the organization's social mission. We thus use the GC context as an extreme setting in which to clearly observe latent hybridity in an organization.

The further richness of the context of this particular GC organization became evident once fieldwork and analysis began. This is discussed at length in Study III (Chapter 4).

Structure of the Thesis

The core findings of the three studies in this thesis are reported in standalone articles, compiled here as Chapters 2, 3, and 4. Having been prepared for diverse outlets, the chapters differ in their format, tone, and style. These are summarized in Table 1.2.

Chapter 2 presents Study I, a qualitative study by Foy and Gruber, which develops and presents the Identity-Society Alignment Theory (ISAT) to explain how key venture decisions are shaped by the dynamics produced when entrepreneurs' identities interact with the surrounding social structure. Based on 50 in-depth interviews with Taiwanese entrepreneurs, we show that the alignment—or misalignment—between an entrepreneur's identity structure and the perceived social structure of their environment produces tensions or reinforcement for the individual that frame their overarching attitude toward firm creation. These attitudes fundamentally shape the founder's strategic orientation, offer, production, and distribution. With this study, we extend theorizing on founder identity and discuss the limitations of theorizing based on a single sociocultural context or a single period in history.

Chapter 3 presents Study II, a review of the psychological literature's various approaches to studying culture, presenting four packaged approaches that management scholars may adopt in their studies of organizational phenomena. While compelling evidence of wide variation in psychological orientations across cultures calls for deeper and broader studies of organizations—particularly how they are founded and led—both within and across cultural settings, the diversity of conceptualizations of 'culture' and directives for its study create considerable barriers to entry for management scholars aiming to do rigorous work. In this study, I discuss key elements of the various approaches available, emphasizing that each approach entails a "package" of philosophical and methodological assumptions, presenting the merits and limitations of each, and providing examples of how management scholars may employ each packaged approach to extend theories of organization.

Chapter 4 presents Study III, a qualitative study by Bergamini, Foy, and Gruber. We examine venturing in the context of grand societal challenges—a context characterized by high complexity, requiring high impact, highly scalable solutions that generally engage multiple institutional actors. The involvement of prominent founders (e.g., celebrities) in developing solutions and ventures to address grand challenges has been a subject of disagreement among scholars, with little empirical work. In an in-depth, longitudinal study of Swiss celebrity founder Bertrand Piccard and the Solar Impulse Foundation, we discover latent hybridity at play as the organization accelerates its sustainable mission with the brand of its celebrity founder—a brand which requires maintaining over time in order to provide continued support to the organization. We refine the concept of latent hybridity and develop a model of organizational awakening and response to latent hybridity, extending the literature on hybrid organizing as well as entrepreneurship in the context of grand challenges.

Chapter 5 entails a discussion of the core contributions of this thesis and promising directions for further research on entrepreneurship across sociocultural contexts. Together, the three studies in this thesis expand understanding of entrepreneurship across sociocultural contexts in important ways, shedding further light on the entrepreneur situated in society, and revealing patterns in the way evolving societies as the backdrop of venture creation influence the very nature of this process and its actors.

1.2. Summary of Studies

	Study I	Study II	Study III
Title	*"No Man is an Island": Examining Founder Identity and New Firm Creation across Sociocultural Contexts*	*Culture, Psychology and Organization Studies: Four Alternative Packaged Approaches*	*Sustaining Latent Hybridity After Awakening to an Implicit Mission: The Case of Grand Challenge Venture Solar Impulse Foundation*
Research Question	How are entrepreneurs' identities (mis)aligned with their sociocultural context? How does this interaction between identity and the perceived social structure affect their venturing?	What approaches are available to organization scholars concerning the study of culture and psychological phenomena?	How does an organization handle the explicit pursuit of a sustainable mission and the implicit pursuit of maintaining the founder's personal brand?
Sociocultural Context	Taiwan: a transitional society harboring multiple social structures	Non-WEIRD[4] contexts: societies that are *not* Western, Educated, Industrialized, Rich, and Democratic	The era of grand challenges: organizing in response to intractable system-level problems
Theoretical Perspective	Identity: Structuration theory	Philosophy of science	Hybrid organizing
Research Methods	Inductive, Qualitative	Conceptual	Ethnographic, Inductive, Qualitative
Authorship	co-author: M. Gruber	sole author	co-authors: E. Bergamini & M. Gruber

[4]i.e. not Western, Educated, Industrialized, Rich, nor Democratic; following Henrich et al., (2010).

Chapter 2

"No Man is an Island": Examining Founder Identity and New Firm Creation across Sociocultural Contexts

SHIRAH FOY[5] & MARC GRUBER

Abstract

Recent research shows that founders' identities have a profound effect on several aspects of firm creation. However, our present understanding of founder identity, based on Western conceptualizations of both identity and entrepreneurship, does not carry over into all other contexts, sorely limiting our understanding of the vast entrepreneurial activity taking place globally. This qualitative, inductive study investigates founder identity across sociocultural contexts governed by different sets of 'rules of the game', allowing us to observe how founder identities function in different social structures. We develop a theory of founder identity–society (mis)alignment, explaining how alignment—or misalignment—between a founder's identity and the perceived social structure generates tensions or reinforcement for the individual, thus producing a variety of attitudes, practices, and distinct firm characteristics. In doing so, we create an opportunity for the integration of prior work on founder identity, illustrate how the empirical context of entrepreneurship may hold important insights for identity research more broadly, and contribute to one of the pressing questions on the role of business in society—namely, the long-term cycle of how sociocultural environments influence founders, who in turn shape organizations that collectively influence the environment around them.

[5] Authorship Notes: This study was a thoroughly collaborative effort. The first author conducted fieldwork and collected the data, producing memos, data visualizations and iterative coding schemes which were discussed in depth with the second author during 20 months of data analysis. The writing process proceeded similarly; approximately 75% of the paper was written by the first author, with invaluable contributions from the second author.

"No man is an island entire of itself;
every man is a piece of the continent,
a part of the main" — John Donne (1624/1923)

The pursuit of an entrepreneurial activity offers individuals freedom in choosing which economic activities they want to pursue, the way in which they want to pursue them, and the goals they seek to achieve with their new firms. In recent years, an identity perspective has allowed scholars to significantly advance our understanding of firm founders as enterprising individuals whose self-conceptualization has fundamental implications for new firm creation processes and outcomes (Cardon, Wincent, Singh, & Drnovsek, 2009; Gruber & MacMillan, 2017; Powell & Baker, 2017). For instance, research shows that a founder's identity has a profound effect on firm heterogeneity (Fauchart & Gruber, 2011) and the identified opportunities (Binder & Belz, 2017). Furthermore, identity processes spur entrepreneurial "dreamers" to action (Farmer, Yao, & Kung-Mcintyre, 2011), help founders in reconciling tensions between social and commercial logics (Wry & York, 2015), affect how they approach stakeholders (York, O'Neil, & Sarasvathy, 2016), and facilitate (or hinder) joint organizing in venture teams (Powell & Baker, 2017).

Yet, despite the major insights that the growing literature on founder identity has provided on the origins of new organizations and the role of founders in shaping their entrepreneurial endeavors, an identity perspective has the potential to generate key additional insights for entrepreneurship research, as well as the broader management and organizational literatures. This is because prior studies have almost exclusively investigated founder identity in a particular sociocultural context: the West.[6] In effect, while this context has allowed scholars to make a first major leap forward in our theoretical understanding of founders and their firms, it is important to recognize that the focus on Western culture and its thought worlds has natural limitations—which are particularly acute when exploring fundamental questions of identity and meaning (e.g., "Who am I?"). This critical observation is not only mirrored in recent evidence indicating that the Western conceptualization of founder identity and meanings does not represent the scope of founders' identities in other sociocultural contexts (Sieger, Gruber, Fauchart, & Zellweger, 2016), but, in a more profound manner, the limitations of confining research of social and psychological phenomena to the West are reflected in studies across the behavioral sciences (Henrich, Heine & Norenzayan, 2010).[7] Case in point: there is consensus among identity scholars regarding the fact that one's identity is not formed in a vacuum, but that identity is shaped in important ways by the sociocultural context in which one grows up and obtains key life experiences (Grotevant, 1987; Abrams, 1996; Reicher, Spears, & Haslam, 2010; Kish-Gephart & Campbell, 2015). In other words, our limited knowledge of founder identity

[6] Following Nisbett (2004), our use of the term "the West" refers primarily to the regions of North America, Europe, and citizens of the British Commonwealth.
[7] In this respect, the research on founder identity (and its effects on entrepreneurial processes and outcomes) is not alone in the limitations of its—even empirically-derived—theoretical models; the need for more contextually universal models is mirrored in more general research on identity (Vignoles et al., 2016; Hwang, 2011), management (Chuang et al., 2015), and the broader behavioral sciences (Henrich et al., 2010; Lancy, 2010).

across sociocultural contexts is not only of *empirical* import—given that rates of entrepreneurship among adults are, on average, higher in non-Western countries than in Western ones (Bosma & Kelley, 2018); but, investigating the identities of founders across contexts is also of significant *theoretical* interest, allowing us to shed light on the boundaries and contingencies of current theories. Finally, such research holds promise providing new inroads into understanding fundamental differences among enterprising individuals, venture creation processes and firm outcomes across geographies, cultures, and time periods.

Against this backdrop, the purpose of the present study is to advance knowledge of founder identities, their embeddedness in sociocultural contexts, and the resulting influence on the firms they create. In our attempt to broaden the horizon of existing founder identity research, we investigate East Asian founders' perceptions of their social environment, of themselves as founders within that environment, as well as the way in which these social- and self-perceptions conjointly affect key entrepreneurial decisions. We conducted an in-depth qualitative study of 58 founders of new ventures on the island of Taiwan, an East Asian research setting that has already been leveraged in other research domains such as political economy (Chu & Hu, 1999), anthropology (Clart, Phillip & Jones, 2003), sociology (Huang, 2011), and cross-cultural psychology (Kim, Yang & Hwang, 2006), given that Taiwan is considered to be "typical" of the East Asian sociocultural context (Chen et al., 2009; Colbert et al., 2014; Hwang, 2015; Chen & Hwang, 2016; Liu, 2002). For instance, in this empirical setting, scholars have investigated the development of the manmade fiber industry (Chu & Tsai, 1999), the introduction of new religions and its implications for identity (Katz & Rubinstein, 2003; Huang, 1996; 2003; Nadeau & Hsung, 2003) as well as education (Lee, 2004). Moreover, in addition to offering an insight into the sociocultural embeddedness of East Asian founder identity, Taiwan's *evolving* character (Huang, 2011; Foot, 2014; Kang, 2014) also offers a particularly interesting research opportunity to observe *multiple social structures* at the same point in time—a *pre-modern*, an *early-modern* and a *late-modern* social structure, each with its own set of norms, values, and prescriptions for how individuals' identities should be defined and, thus, each with its own way of imprinting and interacting with the founder's identity and his or her firm-related actions and decisions. Put differently, Taiwan, as a research setting, provides an unusually rich opportunity to advance understanding of the sociocultural embeddedness of founder identities and how this affects new firm creation.

The findings of our study offer four main contributions. First, whereas prior work has almost exclusively studied founder identity in a single (Western) context, we observe founder identity in the context of three perceived social structures, thus providing insight into the way founders approach key venture decisions in relatively stable societies characterized by primarily one of the social structures, as well as in transitional societies in which founders perceive multiple social structures. Second, we identify a mechanism to explain how founder identity interacts with perceived social structure, and what this means for entrepreneurial decisions. Depending on the *alignment* or *misalignment* between the founder's identity and perception of his or her social structure, we observe important *reinforcement* or *tensions* within founders as they observe society and interact with others, and distinct "expressions" of these identity–society dynamics in both the meaning that venture creation holds for them and in their entrepreneurial activities. In particular, our findings reveal and document how the structure of a founder's identity, in conjunction with the perceived structure of their society, uniquely frames her approach to venturing, ultimately guiding (1) the nature and framing of the entrepreneurs' offer, (2) to whom she markets her offer, (3) with whom she collaborates to produce and deliver her offer, and (3) the overall scope of innovation in the firm. Third, whereas prior work has posited that sociocultural context "set[s] the parameters of identity formation" (Côté, 1996: 418) for any type of individual, our data suggests that an unusually high prevalence of counter examples may be found among entrepreneurs, and that, in such cases, the tensions encountered by these counter-culture founders are systematic experiences. We offer this as an example of how the entrepreneurial setting likely holds important insights for advancing identity research more broadly. Finally, given that we observe founder identities and firm creation in pre-modern, early-modern and post-modern social structures, our findings demonstrate the limitations of theorizing based on one period of history. As societies evolve, the theory of founder identity–society (mis)alignment developed here suggests patterns for the implications of this societal evolution on the nature of venturing, including the function of entrepreneurship both for the individual entrepreneur and for society. We contribute to a body of knowledge that will begin to allow us to sketch out a long-term cycle of how sociocultural environments influence founders, who in turn shape organizations that collectively influence the environment around them.

BACKGROUND

Going back to ancient Greek philosophers like Aristotle and Plato, questions such as, "who am I?" and "what is my role in society?" have intrigued and inspired scholarly discourse on the meaning of "self" (one's "identity") and its implications (Gioia, 1998). Defined as "a general, if individualized, framework for understanding oneself that is formed and sustained via social interaction" (Gioia, 1998: 19), it is important to recognize that the social environment has a key influence on how an individual perceives herself and in relation to others. In effect, because human beings have a fundamental need to define themselves and to find their own place in society (Mead, 1934), scholars have found that identity is a powerful concept that can advance understanding not only of the meanings that are important to individuals but also their behaviors and actions in a variety of social contexts (Tajfel, 1972).

An important context in which identity theory has been fruitfully employed is entrepreneurship research (e.g., Conger et al., 2017; Fauchart & Gruber, 2011; Gruber & MacMillan, 2017; Murnieks & Mosakowski, 2007; Powell & Baker, 2014, 2017; Roundy et al., 2016; Zuzul & Tripsas, 2019). In particular, identity theory allows scholars to better understand individuals as firm founders (e.g., what is important to them, who are important others) as well as their firm creation activities (e.g., with whom they cooperate, which value creation elements they emphasize). This is because individuals strive to behave and act in such a manner that they may achieve congruence between the meanings inherent in their identity and their behaviors and actions in entrepreneurship: if a founder can behave and act in ways that are consistent with his or her identity, then these behaviors and actions will serve as an important source of self-worth and psychological benefit (Hogg, Terry, & White, 1995; Stets & Burke, 2000; Tajfel & Turner, 1979). For instance, the empirical results by Fauchart and Gruber (2011) show key differences among firms founded by individuals possessing distinct types of founder identities. It is in the same vein that McMullen and Warnick (2015: 1380) theorize about successors of family businesses choosing to do so based on the extent to which they identify with the organization, and the extent to which they "integrate family business activities, behaviors, and tasks into their own identity (Gagne & Deci, 2005)".

Although identity theory indicates that the sociocultural context plays an important role in the development of an individual's identity and serves as a key point of reference for that individual when deciding on her behaviors and actions, research on founder identity has largely taken the sociocultural context as a given. As a result, the insights developed in the majority of identity research to date are most pertinent to the Western context and managerial thought worlds. However, as Nisbett (2004: xvi) points out: "Whereas psychologists have assumed universality [in habits of thought], many scholars in other fields believe that Westerners (primarily Europeans, Americans, and citizens of the British Commonwealth) and East Asians (principally the people of China, Korea, and Japan) have maintained very different systems of thought for thousands of years. Moreover, these scholars are in substantial agreement about the nature of these differences." Thus, while existing research has been able to significantly advance our understanding of founders and new venture creation, it is key to recognize that scholars have yet to understand how our theories of founder identity may vary across sociocultural contexts, and how individual and firm-level outcomes may be affected by the interaction of specific identity types with different sociocultural contexts.[8] In other words, the single-context focus of extant founder identity literature is an important shortcoming, because identity research tells us that the meanings that individuals hold are likely to diverge from one sociocultural context to another. For example, in the case of individual motivation to attain a distinctive identity, scholars have found that although the distinctiveness motive is relatively strong across cultures, the ways in which people pursue distinctiveness varies: "people in more individualistic cultures tended to construct distinctiveness more in terms of difference…, people in more collectivistic cultures tended to construct distinctiveness more in terms of social position" (Becker et al., 2012: 849). Along the same lines, results reported by Sieger and colleagues (2016) indicate that Fauchart and Gruber's (2011) founder identity typology was not effective in capturing the differences between founder identities focused on advancing the lives of known and of unknown others in Asian countries (in their case, Singapore and Malaysia). This discrepancy suggests that a key perspective is missing in current theorization of meanings of entrepreneurship held by founders.

In this study, we view sociocultural context as "the unwritten, decentralized 'rules of the game'" (York & Lenox, 2013: 1), whose influences on the individual

[8] One exception may be Yao, Farmer & Kung-McIntyre's (2016) investigation of prototypical views of the entrepreneurial role across China, Taiwan, and the United States. However, again, they sought consensus regarding each nation's view of the prototypical entrepreneurial role, rather than explore the variation of prototypes within and across each.

are theorized as normative—dictating values and expectations, and cultural-cognitive—guiding mental schema and a person's awareness (Scott, 1995). In particular, absent a tradition for the study of the identity–society relationship within the existing entrepreneurship literature, we consider to what extent the broader management and organizational literature may offer insights on how sociocultural factors interact with the identity of leaders or managers in the context of *organizations*. In this vein, Lee and Masuda (2017) show that managers of multicultural teams are seen as more successful and stronger leaders when they integrate both their home and host cultures into their identity. Other examples from the literature which examine tenets of identity and culture include Kish-Gephart and Campbell's (2015) work on CEOs' social class background and their approach to strategic risk-taking, in which they investigate how "material conditions [corresponding with social class], through their influence on what a person owns and experiences, shape how individuals perceive where they stand in comparison to others (Kraus et al., 2012)" (Kish-Gephart & Campbell, 2015: 3). Furthermore, the practice of examining identity in the context of society, and its implications for (cross-cultural) management is embedded in the work of Hofstede (1981/2001; Hofstede & Hofstede, 1991) on how four dimensions of culture affect managers' self-construal in relation to others (e.g., power distance), and group (organization) identification (e.g., via individualism-collectivism).[9]

Given that there is limited prior work on how individual identity and society interact in organizations, it is useful to open the lens even further and to refer to research on how sociocultural context influences individual identity *in general*. Specifically, research in this regard indicates that identity development is "based on a universal need to define oneself in one's context" and cultural elements "may be accepted, rejected, or combined in novel ways" (Phinney, 2000: 29) in the process of the individual's attempt to build an identity which is rooted "in the core of the individual yet also in the core of his communal culture" (Erikson, 1968: 22). Whereas Western researchers have primarily focused on individual identity (e.g., Erikson, 1968), non-Western researchers have tended to focus on group identities, consistent with past research on the respective individualist and collectivist orientations of these broad cultural regions (Phinney, 2000). A finer-grained perspective has recently been offered by Vignoles and colleagues (2016: 967), whose findings suggest that "cultural groups emphasize different ways of being both independent and interdependent".

Taken together, these observations indicate, not only, that founder identity and its relation with the sociocultural context has thus far not been subject of prior research and, hence, presents an important gap in our understanding of entrepreneurship, but that—more generally—we lack important knowledge in this vein in the broader organizational and managerial literature. We therefore undertake an exploratory study of founder identity and the firm-level outcomes of identity–society interaction in Taiwan, a setting whose history and ongoing development and transition allows us to observe multiple sociocultural contexts, boasting significant variation, within a relatively small geographical region.

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[9] Although these scholarly works do not explicitly use an identity lens, they examine constructs used by cognitive psychologists and social psychologists studying identity.

RESEARCH SETTING

We conduct our study on the island of Taiwan, a setting which is not only descriptively different from the Western sociocultural contexts of prior studies (e.g., Taiwan has a much higher Power Distance than Western countries and is at the opposite end of the spectrum on Individualism [Hofstede Insights, 2017]), but—recalling sociocultural context defined as "the unwritten, decentralized 'rules of the game'" (York & Lenox, 2014: 1)—also boasts significant variation on the island itself, containing multiple sets of rules for a game that is changing, or has even perhaps become a setting for multiple games. This multiplicity of 'games' and 'sets of rules' stems from fragmented structural progression of this society's various institutions, leaving some—such as education and, to a great extent, parenting—in the traditional roots of the past, while others—such as the post-OEM (original equipment manufacturing) economy—plummeted into a new set of rules governed by the game of consumer culture. The origins of this intertwining of tradition and modernity are concisely articulated by Lee (2004: 576): "From the three decades following 1949, Taiwan's leaders gradually erased the colonial influence of Japanese culture and revived Chinese cultural heritage and language, in particular Confucianism, in order to resist Mao's Cultural Revolution, which called for the destruction of the 'four olds', namely old ideas, old culture, old customs and old habits (Kung, 2000). Taiwan became a meeting point for East and West and a repository of traditional Chinese culture. In the past few years, Taiwan has been also profoundly affected by the concepts of modernization and democracy imported from the USA and Europe. Hence, traditional culture and modern culture have become intertwined in Taiwan."

We see the legacy of traditional Chinese culture especially strong in family life and social relations, due, in part, to the core emphasis of Confucianism on maintaining right relationships (Ho, 1995; Hwang, 2000; King & Bond, 1985). We also see this reflected in the education system, which has favored rote memorization as opposed to critical thinking—whose merit has only recently begun to be explored for education (Lee, 2004).

The paradigm of modernity, and postmodernity, can be seen increasingly seeping into the spheres of Taiwan's industrial and consumer culture. An enduring segment of tradition-oriented artisans who produce by hand and transmit their craft from master to apprentice has been almost entirely replaced by, first, scale- and efficiency-oriented factories producing for Western brands, and subsequently—when Taiwanese living standards rose during fifty years of OEM, and cost-driven Western brands moved on in search of cheaper manufacturing sites—more innovation-oriented firms with an awareness of the need to establish brand recognition and a B2C presence.

The diversity of influences in Taiwanese society creates a setting requiring some navigation in terms of individual identity construction. With a *national political identity* that is contested—with respect to Chinese-Taiwanese relations, and a *national cultural identity* that has been heavily influenced by centuries of Portuguese, Japanese, Spanish, Dutch, English colonization, the Chinese Qing Dynasty, and 20th-century immigrants from Mainland China, in addition to the island's twelve aboriginal tribes, the Taiwanese people's sense of what ties them together as a people, and what distinguishes them from neighbors, is uncertain (Buzan & Zhang, 2014; Lee, 2004).

While Taiwan may have a somewhat unique history, the nature of its roots and transitional state are characteristic of the region; as indicated, for over twenty years social psychologists have characterized findings obtained in Taiwan as generalizable as "East Asian" in terms of culture (Chen et al., 2009; Chen & Hwang, 2016; Liu, 2002) and religion (Clobert et al., 2014; 2015)—specifically "Confucian" (Han et al., 2005; Wei & Hwang, 1998). Buzan and Zhang (2014: 2) describe East Asia, "with on-going political and economic transformation at national, regional, and global levels," as arguably the most interesting region on the planet with respect to studying various phenomena in a transitional sociocultural context. Together, the differences that distinguish Taiwan from the settings of prior work, along with its own transitional nature, provide a rich setting for studying founder identity and its interrelation with the sociocultural context.

METHODS

Given that the research topic we seek to address is hardly understood and requires fine-grained insights, we chose a qualitative research approach. Below we describe the sampling approach, our data sources, and our data coding and analysis.

Sampling Approach

A theoretically driven sampling method was employed, starting with the textile and fashion industry, and expanded to include ventures in hospitality, lifestyle products, and mobile applications. In order to maintain a level of generalizability (to East Asia) and maximize the variety of different founder identities captured in the sample, key criteria for an industry setting dictated those (a) that are common to most countries in the region, (b) whose starting capital requirements are not so excessive that they would predispose founders to an intensely (un-proportionately) profit-oriented approach, and (c) are likely to attract founders with various social motivations—because, for example, there is some opportunity for creative expression accompanying the business opportunity. Given the low threshold for entry to the market, these businesses, in general, are less about technology and more about what the founder puts into it, meaning that these are "immediate" industries in which the founder, at least in the early years of operation, is often the sole and/or chief designer. Instead of being mediated by layers of product developers, the link between "who you are" and "what you make" is immediate and palpable.

Following prior studies on new firm creation, we included new ventures in our sample that were (i) independently held and (ii) eight years old or less (cf. McDougall, Covin, Robinson, & Herron, 1994). We created a database of new ventures (established between 2010-2017) in the Taiwanese fashion and textile sector. Cold emails inviting founders to participate were sent to 86 firms, receiving 18 responses (21% response rate). After completing a screening survey, where demographic and firm data were collected to ensure that founders met the criteria for participation in the study, interviews were scheduled. A "snowball" sampling method was employed to gain access to other entrepreneurs while leveraging the *guanxi* (social capital and trust) of those making the introduction. This entailed asking founders, at the end of each interview, to recommend other entrepreneurs who would be interesting for us to talk to, especially those who might have different experiences and perspectives. The sampling strategy took into account desired diversity in age, gender, and urban (e.g., Taipei) vs. rural (e.g., Hualian) settings. The sample comprised mostly founders of the ethnic majority—“Han people” who make up 95% of the Taiwanese population—but also ethnic Taiwanese minority groups (2.3% of the population) locally referred to as “mountain people” (CIA, 2018).

Data Sources

One of the authors conducted semi-structured interviews with a total of 58 founders at 46 firms, accompanied by one of two local interpreters engaged for the study. A set of questions to guide the semi-structured interviews were developed, aiming to evoke answers that would capture the founder’s journey to starting up, self-conceptualization, venture attributes and business model, and their perceptions of the context in which they live, interact, and do business. We paid special attention to employ phrasings that reduce power distance and avoid evoking defensiveness in the founder. In every case, these questions were supplemented by spontaneously generated probing questions.

Audio recordings captured the researcher’s questions, the interpreter’s translation (when needed), the founder’s response (usually in Mandarin), and subsequent comments in Mandarin between the interpreter and founder to clarify nuanced replies. Each audio file was transcribed and all Mandarin and Taiwanese dialect translated into English. As a more appropriate alternative to back translation, this allowed the “sufficient” simultaneous (spontaneous) translation of the live interpreter to be supplemented by the translation of a second professional who had the opportunity to carefully consider the most precise meaning. In the occasional cases where the meaning of the interpreter’s and transcriptionist’s translations diverged, these were resolved through additional discussion and, in one case, direct verification of the intended meaning with the founder.

The resulting transcribed interactions with founders form the corpus of the data analyzed in this study. These were triangulated with founders’ responses to a screening survey developed for this study; with information from co-founders and employees; with information provided on company websites; with founder publications on personal social media accounts; with newspaper articles about the firms; with brochures and other strategic documents provided by founders; and with notes about unrecorded interactions that were kept in a research journal.

Data Coding and Analysis

Our coding and analysis unfolded in three stages, with the first two focusing on understanding the interaction between social context and individual identity: in the first stage with a purely inductive approach, complemented by an abductive turn in the second stage. In the third stage we focused on firm-level implications.

Stage 1. An inductive approach was taken to coding the data, following the Gioia methodology (Gioia, Corley & Hamilton, 2013). Data analysis began with two rounds of inductive coding, focused on uncovering how the founders perceived their sociocultural context, and how they perceived themselves (within that context). We coded the interviews in multiple ways, including using Brewer and Gardner's (1996) three elements of social identity (basic social motivation, basis of self-evaluation, frame of reference). At this stage, there was no obvious variation in founders' *identities,* however there was clear variation in the way founders referred to their context. Founders described three distinct types of social environments, or contexts.

Three second-order themes emerged with regard to the relationship between founders' identities and their context. First, multiple founders talked about a sense of *emancipation* from the norms and expectations of traditional society—often leading to, or in conjunction with, founding their firms. Second, there was evidence of *tension* in the form of (a) tensions embodied in social interactions between the founder and others, and (b) tensions held internally by the founder, based on incongruence between the ideals they have for themselves and society, and the ideals held by others. Third, despite founders' self-described emancipatory journey, and the tensions they experienced (often as a result of the emancipation), they expressed varying degrees of acceptance of, or commitment to, a level of inherent and enduring *embeddedness* of their business activities in their social context.

Stage 2. At this point, we began "cycling between emergent data, themes, concepts, and dimensions and the relevant literature" (Gioia et al., 2013: 21). Cross-case comparison suggested that the byproduct of individual emancipation from a traditional societal structure is a concept we referred to as "identity capital", which appeared to be an important form of capital enabling innovative thinking with regards to product and business model innovation. A literature search for "identity capital"—to determine whether what our inductive process had yielded was indeed a new construct—led us to Côté's (1996) model of the culture-identity link and the concept of "identity capital" as a tool enabling individuals to "negotiate life passages in an increasingly individualistic, complex, and chaotic world" (417). Moreover, the major sociological theories synthesized in Côté's framework (adapted in Table 2.1), positing three distinct social structures linked to three patterns of identity formation, aligned with our inductively emergent codes.

We briefly discuss Table 2.1 to give context for the remainder of our analyses. Across the top of the table, three distinct social structures—Pre-modern, Early-modern, and Late-modern—are outlined. These are tied to economic development, charting the path of societies from agricultural, to industrial (production-oriented), to post-industrial (consumption-oriented). For each type of society, Mead (1960) described distinct patterns of social interaction: pre-modern, *postfigurative* societies entail a top-down knowledge transfer and socialization—elders make decisions for the youth. Early-modern, c*ofigurative* societies expect a degree of rebellion, wherein young people, individually or in collaboration with peers, chart their own path. In fast-paced, late-modern, *prefigurative* societies, the youth are on the cutting edge and the elders are irrelevant. It is important to recognize that these top-level socioeconomic structures and patterns of social interaction are reflected in prototypical patterns of identity formation (Riesman, 1950), in which the general means by which individual identity is formed in these societies are directed, respectively, by tradition, self (inner-directed), or other peers' assessment of one's belonging based on how a person presents herself (image-directed). These patterns are reiterated and supported in the widely accepted sociological and psychological theories of identity summarized in the bottom four rows, which we refrain from elaborating on in this paper.

2.1. Cultural prototypes of identity formation patterns constituting the culture-identity link (Adapted from Côté, 1996: 421)

Level of analysis	Social Structure		
	Pre-Modern→	Early-modern→	Late-modern
Interaction (Mead, 1970)	Postfigurative	Cofigurative	Prefigurative
Prototypical identity formation pattern (Riesman, 1950)	**Tradition-directed**	**Inner-directed**	**Other-directed**
Social identity (Gecas & Burke, 1985)	Ascribed	Achieved	Managed
Personal identity	Heteronomous	Individuated	Image-oriented
Ego identity (Marcia, 1993)			
1. Structure	Foreclosed	Achieved	Diffused
2. Process	Adopted	Constructed	Discovered

We revisited each of the interviews with Côté's (1996) framework in mind, and adopted the labels of *Pre-modern, Early-modern,* and *Late-modern* for each of the contexts (which we began to refer to as "social structures", following Côté [1996]), along with the terms that best fit our empirical data, *Tradition-directed, Inner-directed,* and *Image-directed* (adapted from Riesman, 1950), to refer to founders' identity structures[10]. Identity structure, according to Marcia (1993), refers to what experiences are deemed relevant to identity and how they are handled. At this point, considering "data and existing theory…in tandem" (Gioia et al., 2013: 21; Alvesson & Kärreman, 2007)—specifically, the premise that social structures "set the parameters of identity formation" (Côté, 1996: 418) and our data which showed founders' identity formation patterns clearly outside the parameters of their perceived social structures—two research questions emerged: *How are founders' identities (mis)aligned with their sociocultural context, and how does this interaction between identity and the perceived social structure affect their venturing?*

We transposed the table outlined by Côté and, retaining the three columns representing the three social structures, but allocated a row to each identity structure and plotted founders within the framework to understand how their *identity structures* were *distributed across perceived social structures.* Using the labels adapted from Côté and Riesman, we then categorized founders according

[10] While Riesman (1950) uses the term *Other-directed*, we found *Image-oriented* (borrowed from personal identity theory's formation pattern in the Late-modern society) to be a better descriptor of our data.

to their identity structure and the social structure in which they perceived themselves to be embedded. Three founders could not be categorized due to insufficient data. The distribution of the remaining 55 founders across identity structures and perceived social structures is shown in Table 2.2. With data supporting the logic that the inner-directed identity orientation is most conducive to entrepreneurial activity, we focus our analysis on founders with *inner-directed* identity structures across all three social structures—resulting in three focal categories representing more than 85% of the sample.

2.2. Sample Distribution

	Perceived Social Structure		
Identity Structure	Pre-modern	Early-modern	Late-modern
Tradition-directed			1
Inner-directed*	**11**	**19**	**18**
Image-directed		3	3

*Our focus in this study

In the final step of Stage 2, we employed a strategy called "stacking comparable cases" (Miles, Huberman & Saldaña, 2013: 103), in which we wrote up rich descriptions of multiple cases, followed by matrices that help to identify cross-cutting variables. In this way, we were able to understand, for each group, the social meaning of being a founder in their context, and the social function of founding a venture in their context.

Stage 3. Our goal in this final stage was to investigate the implications of the founder identity–society link for the new firm. We coded each interview for the activities founders performed in their venture (including *what* they produced), as well as *how*, and *with whom* they produced and delivered their offer, and *to whom* they marketed and sold. The latter two were of particular interest to us, as the founder identity–society nexus holds promise for understanding why and how founders engage with others in building and operating their ventures. Then, grouping the interviews and venture profiles by identity–social structure configuration, we employed constant comparison within and between cases, and within and between identity–social structure groups as shown in Table 2.2 above (Miles, Huberman & Saldaña, 2013). Three distinct types of ventures emerged, varying across four key venture dimensions (cf. Table 2.7), concerning the offer, market, value chain, and scope of innovation. After having iteratively coded and compared 38 interviews, no further insights emerged from each additional interview with regards to the identity–social structure configurations and venture types; we had reached what Strauss and Corbin (1998) refer to as theoretical saturation. The remaining interviews were coded, categorized, and provided support for the various dimensions and properties of their respective types.[11]

[11] The typology we present conveys the *prototypical* characteristics of each group of founders and firms in a particular category. As is characteristic of typology development due to the nature of complex human and social phenomena, there is some degree of variation even within groups; our framework is not meant to be prescriptive, but rather

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A person's identity structure describes how experience is handled and which experiences are deemed important to identity formation. The nature of a person's identity structure immediately puts them at odds with, or in sync with, the surrounding society, whose social structure sets the parameters for acceptable identity formation. We begin by describing the variation of social structures perceived by founders, and then, based on the way each of these social structures interacts with founders' inner-directed identity structures, discuss three identity–society frames for entrepreneurship. We then investigate how each of these three identity–social structure configurations is reflected in the founders' decisions in new venture creation along four fundamental dimensions: (1) the firm's offering, (2) definition of the target market, (3) construction of the value chain, and (4) the scope of innovation across the firm.

Founders' Perceptions of their Sociocultural Context

Following the procedure for data analysis described above, we explored the way founders perceive their sociocultural context. The contexts in which they describe being embedded reflect three distinct social structures: a pre-modern, an early-modern, and a late-modern social structure (cf. Table 2.3).

The *pre-modern social structure* is characterized by tradition and hierarchy. For Taiwanese founders, this perception was partly rooted in tenets of Confucian thought, such as filial piety, or in what they often referred to as "Chinese parenting". Consider the cases of Sirena and Lina, who lamented this aspect of the social expectations they perceived in their environment.

> Blind filial piety causes one to abandon logical reason, to determine whether a particular action is the best for you or your family, it just blindly requires us to follow the words of our parents without question…
> —Sirena, founder of a shoe brand

> They [my parents] actually wanted me to be a teacher, or a doctor, you know, more traditional career options, or one of the three top professions, or just head towards the path of a public servant.
> —Lina, founder of a wedding dress brand

Founders who perceived pre-modern social structures talked mostly about their family and their education, as well as certain industry structures and norms in Taiwan, especially in manufacturing, where founders such as Chenli experience resistance to change.

> In Taiwan the technique is quite good, the manufactory [sic] is quite good, but sometimes when we discuss with the master, he was [saying] 'no no no, we won't do that, this is not normal, we cannot do that it will be a problem, we cannot do that, we cannot do that.'
> —Chenli, founder of a brand of leather bags and shoes

descriptive of the essential dimensions that represent the shared qualities of a particular group (type), and distinguish them from other groups.

Next, the *early-modern social structure* is characterized by individualism and rationale. Founders who perceived themselves in primarily early-modern contexts sometimes, but not always, talked about this social structure in reference to their family life as a child and their parents' approach to raising them.

> [My dad] started his own business so I think he's like a pioneer for the industry. So I think, at the time, he thinks that's the best for us.
> —Stella, leather accessories brand

> I think curiosity is human nature, but I think I have more because... my mom spent a lot of time in her job so I [was] almost independent... You know parents in Taiwan like to dominate everything, they say, "no, yes, go there, do that", you know? I think I'm very lucky that nobody dominate[d] me.
> —Alex, founder of a co-living accommodation

Others explicitly talked about shaking off the weight of the pre-modern context of their childhood and finding their way into groups with early-modern structures. The most common reflection of an early-modern social structure is in the way founders discussed their current network of (generally entrepreneurial) friends, along with social norms and a certain democratization of tools that can be leveraged in pursuing entrepreneurial activity.

> Taiwanese Kickstarter, Zeczec. It's the Taiwanese one. The founder of the website is my classmate from high school… and the biggest projects of Zeczec are all by my friends… and crowdfunded a lot of money, more than 40 million Taiwanese dollars. It was huge. And then one of my friends, who share a studio with me, introduced his first 3D printing machine… [it] raised 4 million Taiwanese dollars. And these people, who are doing great projects are my friends, my closest friends. —Kai, founder of a design objects firm

Finally, the *late-modern social structure* is characterized by a lack of principle and rules coupled with a sense of the masses lacking reflection and intention, and increasing disconnectedness among people. As illustrations, consider how Daniel and Matt perceived their sociocultural context.

> People in Taiwan is like, we don't have a foundation, we don't have a firm belief in principle, so it's like too flexible… Nowadays people are unprincipled. … It's like the government has many regulations, rules and laws, but the morality [of people] is corrupted.
> —Daniel, founder of a hotel

> Society is so disconnected… in general, like major cities… Hong Kong, Shanghai, Tokyo… Amsterdam… all the people that I know, we kind of suffer under the same thing. … with the high living cost… they feel like they got 80 hours working every week, it's so tiring, their social circle are so small, they try to know more people.
> —Matt, founder of co-living accommodation

Founders who perceived themselves in primarily late-modern social structures tended to speak about society-at-large, including trends in lifestyle, values, preferences, and consumption that transcend national and regional boundaries.

Table 2.3 synthesizes the key contextual descriptions provided by founders. It is striking how well they reflect the characterizations of each of these three social structures as outlined by Côté (1996), building on both prior empirical and theoretical work (cf. Gergen, 1991; Giddens, 1991; Mead, 1960).

2.3. Characteristics of Perceived Social Structures

Dimension	Pre-modern Structure	Early-modern Structure	Late-modern Structure
Individual identity governed by	Tradition	Democratic individualism; invidividual will	Discovery
Salient social others	Parents; elders	Peers; government	Society at large
Embeddedness demanded by society	*high* you are one of us whether you want to be or not	*relatively lower* you have the opportunity to connect with others if you want	*uncertain* no one is making the rules anymore

Our interviews revealed that, in addition to the three classic social structures, some founders (seventeen in our sample) perceived a sociocultural context in which key institutions (e.g., family values, education, industry norms and standards, consumer culture, etc.) are characteristic of different social structures; in effect, these founders do not perceive a united society, but rather pockets of tradition (pre-modern legacy) and progressivity (late-modern influence, generally resulting from the adoption of values originating in the West), often accompanied by remarks regarding change or transition in Taiwan, and in the global society at large. However, subsequent analyses revealed that these founders do not constitute a distinct type/group. Rather, based on the social structure with which they perceive themselves interacting the most—and consequently with which they experience the most tension or reinforcement—each of them shared a framing of their entrepreneurial activity with one of the three founder types presented below moreso than others, and displayed corresponding firm characteristics.[12]

Identity–Society (Mis)Alignment: Reinforcement or Tensions in Venture Creation

In the quotes presented above, we begin to see that founders' perceptions of their sociocultural environment are not purely descriptive, but most often

[12] We do observe a hybridity of sorts, in the sense that founders who perceive multiple social structures across different sectors of society (e.g., pre-modern in family life and community governance; late-modern among customers) experience tensions on both fronts to various degrees, and different aspects of their venture dimensions may be like one or the other groups. In this study, we are interested in the "pure" cases, as one should understand pure in order to understand hybrid.

accompanied by a value judgment, communicating their reaction to, and even prescription for, this environment. Building on the platform provided by these observations, this section will investigate the identity–social structure configuration and thereby bring to the forefront one of the most important ideas examined in our study, that is, the interrelationship between identity and the particular social structure in which the founder is embedded. This novel perspective not only documents key variation among identity-social structure configurations but, perhaps even more importantly, allows us to reveal and observe key reinforcement effects or tensions. Specifically, our discussion will show that founders whose identity structure is *aligned* with the social structure of their context benefit from the natural *reinforcement* of the way they define themselves and interact with society (as reflected in the expectations of others). Conversely, founders whose identity structure is *misaligned* with their surrounding society experience *tensions*—both internal (cognitive) and/or external (conflict with others)—that arise from this misalignment.

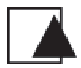
Importantly, we also find that this reinforcement or tension, resulting from founders' identity (mis)alignment with the social structure they perceive themselves to be operating in, frames the meaning of entrepreneurship for them. To reiterate a key argument of identity theory, individuals strive to act in ways that allow them to achieve congruence with their identities; in other words, people are driven to act in certain ways because those actions fulfill an *identity function*. We find that founders with inner-directed identity structures—all determined to be the chief architects of their own identities—express their reason for venture creation in various ways depending on their social context, reflecting how the same act of venturing fulfills different identity functions in different social contexts. On one hand, their identity–social structure configuration, and the corresponding tensions or reinforcement, thus frames the *identity function* of entrepreneurship for the founder—such as self-exploration (presented with the others in Table 2.4 below)—based on their identity needs or desires in relation to the context. On the other hand, it frames the *social function* of entrepreneurship, based on their identity-based perception of what society needs.

Foreshadowing our more detailed discussion below, Table 2.4 depicts the forces at work in each identity–social structure configuration, and the identity function and social function of entrepreneurship to which these forces give rise (specific venture outcomes will be discussed in Table 2.7). In particular, Table 2.4 describes the tensions or reinforcement experienced by founders with inner-directed identity structures.[13] For ease of exposition, we additionally introduce a symbol for each structure: we illustrate the (mis)alignment between founders' inner-directed identities (the solid triangle) and the outer border representing their perceived social structure—a square for the pre-modern structure, in which we can imagine the *pillars of tradition* which guide identity formation; a triangle for the early-modern structure, recalling the arrow on a compass as each

[13] As Taiwan has experienced rapid recent and ongoing socio-economic change, we have been able to observe founders whose perceptions of their surrounding social structure vary. It is important to note that in this study we do not seek to make any claims about dominance or prevalence of social structures, per se, in Taiwan; rather, we are interested in founders' *perceptions* of and experiences with the social structures in place, based on their upbringing, family life, education, and industry experience, among other institutions.

individual *charts* his or her own path; a circle for the late-modern structure, reflecting the continuous *discovery* of “who I am”.

2.4. Identity-Society Configurations and the Dynamics of (Mis)Alignment

	Perceived Social Structure		
	Pre-Modern	Early-modern	Late-modern
Reference symbol			
Relationship between identity and society	*Misalignment:* Self-determined goals *in tension with* the perception of socially-imposed values and relationships	*Alignment:* Self-determination *reinforced by* the perception of a society that embraces it as a right & responsibility	*Misalignment:* Deep value for self-determination *in tension with* the perception of a drifting, ungrounded society
Identity function of entrepreneurship	**Self-Exploration**	**Self-Manifestation**	**Own Value Transmission**
Social function of entrepreneurship	Design one's own life	Design products	Design society

Pre-Modern Context: Misalignment for Founders with Inner-directed Identities. When founders have self-directed identities, yet are embedded in a social context that is pre-modern, traditional, and “top-down”, we find that they are subject to the *misalignment* between their own determination to construct the self and life they find appropriate for themselves, and a context that is notably postfigurative—wherein younger people are expected to be shaped by, and directed by, elders who feel they know best for who an individual should become. A self-directed founder, out to create an organization of his or her own imagination, inherently defies the tradition-driven pre-modern context.

These founders often face considerable pushback or doubtful inquiries from those around them. They can feel that what they are doing goes against the grain. Their elders (parents, grandparents) feel that they have the right to dole out advice and suggestions, and, in this traditional context, the younger founder knows that she is expected to listen. The founder thus gives a public nod to the elders, avoiding conflict by refraining from outright objection to the advice proffered, but simply not implementing any advice that they may find detrimental to the business.

> Sometimes there were just too many people giving opinions. They’re in their 70s, and I respect them as the older generation. I can’t really say that I just won’t listen to them. They don’t really know how to do these things, but they like to say something about it. They do have a little influence on our decisions… Sometimes I would tell my parents yes, but don’t actually do it. –Esther, founder of a café and coffee roastery

Founders in the pre-modern context often employ this coping strategy of conflict avoidance. Since relationships are king in the pre-modern context, much may be accomplished through leveraging them—e.g., quality suppliers secured, community ties maintained—*if* founders manage not to burn bridges while detaching themselves from what may be perceived as social obligations. To this end, we see a certain flexibility, even sacrifice, from these founders, in response to the high embeddedness expectations of their pre-modern context, exemplified by Ben and Jie's struggle:

> **Ben**: Taiwan is not very supportive of artistic career. If they [people in general] want to do interior design, their parents won't give an opinion; they want them to become doctors or lawyers. It's hard for them to find someone who can really help. They hear about our stories, and hope that we could give them advice. Often when I'm working, they would come, and we have to spend an hour talking. It sometimes delays our own work.
> **Jie**: We just have to stop working and talk to them.
> —Ben & Jie, fashion brand founders

For these inner-directed founders in a pre-modern context, venture creation is a vehicle for establishing an outlet for their creativity; it serves the identity function of establishing a time and place—a context—for *self-exploration*. For these founders, the venture is not the means to an end; it is the end in itself. While wealth, status and family well-being are not unimportant, these founders would still venture, even if they were in possession of all the aforementioned, for the processes of conceptualizing products or services, and creating the environment to deliver these, inherently add value to the founders' sense of self. For instance, we see this encapsulated in Lu's motivation:

> The first moment [starting up], I just want [to] make something by myself and which I like (…) I want to do something that I like and not influenced by any others … —Lu, founder of a jewelry brand

By building their own brand, founders ultimately create a social setting in which they can *design their own life*, living out their days doing something they are passionate about—one which, if successful, may earn them the approval of otherwise skeptical onlookers.

> [Interviewer]: What prevented you from immediately going to start a café?
>
> **Albert**: It had something to do with my family's expectation. They wouldn't have been okay with me opening a coffee shop. Back in the days, coffee shops didn't seem like something that would be successful. They wanted me to be successful. (…)
>
> [Interviewer]: How do you define, or measure success, for yourself as a founder of [redacted] Café?
>
> **Albert**: To have returning customers, like people who know about this place. Another important thing is, to have my family's approval. Many of the things I do, I don't want anyone to be worried. When we just opened our café, they were kind of against it. Their thoughts were very traditional. They didn't understand why a government employee and a psychologist would open a café. It was so risky. (…) They even thought that maybe my wife persuaded me into doing it, but I told them it was me. I wanted to make them stop worrying about this café. Now, we are

> at least making money, so for me that is success, although we haven't fully achieved our goal.
> –Albert, café founder

Early-Modern Context: Alignment for Founders with Inner-directed Identities. Inner-directed founders in an early-modern context—unlike those in a pre-modern context—are not hindered by the anchor to a society that would prefer to propagate tradition rather than invite innovation. Rather, these founders' inner-directed identity structures are *aligned* with a society that recognizes self-determination as both a right and a responsibility, and founders benefit from the *reinforcement* of their inner-directed founder identities in an environment that is supportive of entrepreneurial activity (cf. Table 2.4). We see this clearly in David's reflection on the times:

> The power of young adults is rising dramatically… now they are the major influence of the society… we can use our strength to get what we want or to express ourselves to the whole society; that's why I started to do crowdfunding with my friend. … So now the government tries to have more interaction with young people and encourage them to start their own business.
> —David, founder of a fashion accessory brand

In an early-modern, industrial revolution-esque environment, relationships are no longer the only key resource; individuals whose ideas and products have merit are able to have a chance in the marketplace, exemplified by the proliferation of crowdfunding among these founders. They thus engage with society authentically, with an air of "take it or leave it". Their approach to venturing, indeed the identity function of new venture creation, carries the joy of freely *manifesting one's creative self* in standalone products and services. These founders do not need the cover of venture creation to design their lives—as they are granted this social norm by their early-modern environment; instead they turn their attention to focus on designing products, which they can fill and imbue with meaning. *Designing, producing and delivering such products* to others represent the social function accompanying an externalized manifestation of self.[14] What distinguishes these founders from the ones we turn to next—who see themselves in a late-modern social structure—is the emphasis on the product: for the former, ventures are primarily vehicles for transmitting products (not values, like for the latter). For founders in an early-modern social structure, products should be imbued with meaning, with a statement, but the statement does not exist independent of the product.

Late-Modern Context: Misalignment for Founders with Inner-directed Identities. Inner-directed founders who perceive a late-modern social structure find themselves in misalignment (cf. Table 2.4). To their chagrin, they feel awash in a lost, drifting society marked by consumer culture, a widespread "lack of

[14] In this vein, we note that many inner-directed founders in an early-modern social structure are aware that entrepreneurial ventures can be a vehicle for social change, and in some cases they do engage in venturing with a social component. But even for those who do not pursue an explicitly "social" goal, it is important that a strong sense of meaning underlie their business. These meanings span the quality of the products, an ecological consciousness, a "spiritual statement", revitalization of the local economy, and a more united global community.

morals"; a mass of people who do not know themselves or what they really want. Their personal conviction about each individual's duty to define his or her own values is a source of *tension* in a context where they see the public indiscriminately following the latest trends.

> Most people pay attention to what is trendy in those mainstream fashion cities, such as New York, and simply follow them; they flow with the mainstream. … Western trends are leading always the fashion industry… But I think the true fashion is presenting the local characteristics. The core of fashion is to highlight and spread the local culture and traits. Simply following Western trends is not fashion; [it] is running a profit-making business. —Luis, founder of a fashion brand

> Suddenly, if for some reason [Mark Zuckerberg] wears this shirt, I swear to God everyone in Taiwan will think it's so cool. Right now they don't care, right? But I'm saying like, ultimately, if something like this happens, then they'll be like, "Oh, this is so cool."
> —Tim, founder of a travel fashion brand

> You can fulfill the government['s] every law, every requirement, but because the morality is corrupted… it's not right but at the same time you are protected by the law. Nowadays people are unprincipled…
> —Daniel, hotel founder

In order to mitigate frustration stemming from the misalignment between their own identity structure and that of their surrounding society, inner-directed founders in a late-modern social structure call themselves to rise above what they see as widespread moral shortcomings and to set an example of how it could be—to "offer another option," as multiple founders articulated it. From an identity perspective, the function of firm creation, therefore, fulfills the founder's need to *transmit their values*; the social function being embodied in their contribution to *designing society* as they envision it. Daniel, who we just heard lamenting about the unprincipled nature of people today, is an excellent example of how founders in a late-modern social structure transcend their despair and channel their energy into transmitting an alternative reality:

> It doesn't matter what you do, but because you are business, so you are like rooted in the society, so you cannot avoid the connection to the society, so when the business go bigger and bigger, you will have more influence on people's life. So then it's important… to have good [value added] to people.
> —Daniel, hotel founder

However, despite their desire to see a more grounded society, the founders in our sample were not forceful in introducing their vision or values. Perhaps the temperance they display is influenced by cultural norms of Taiwan—ones that operate across all the perceived social structures, such as those that are based in centuries of Confucian thought—because there are plenty examples of Western founders who perceive a late-modern social structure and deliver their vision for society in a much more imposing way.

> Confucianism. It's alright. Someone said that it limits Asians. It taught us to be modest, and that could be limiting your way of thinking.
> —Ru, founder of a fashion brand

> I just want to introduce a different value… But when I am with my customers I won't emphasize it…
> —Luis, founder of a fashion brand

For inner-directed founders in a late-modern social structure, who feel they "see clearly" amid a confused generation, their new commercial venture is, from the perspective of needs based in their identity, a vehicle for the *transmission of their own values*—the venture is a way of communicating who they are and what they stand for. This is closely tied with the social function of *designing society* for those whom they feel are unable or unwilling to do it themselves. We find that these founders have already thoughtfully designed their own lives, and they continue to design products and services, but they are fundamentally seeking to design society.[15]

Table 2.5 depicts the characteristics of founders across each identity–social structure configuration.

2.5. Sample Profile – Founders with Inner-directed Identities across Perceived Social Structures

	Perceived Social Structure		
	Pre-modern	Early-modern	Late-modern
Number of inner-directed founder identities in sample	11	19	18
Average firm age*	4	3	3
Average age of founder*	38	33	35
Number of women / men	6 / 5	7 / 12	8 / 10
Highest education level			
Trade school	1	2	2
Bachelor	4	11	8
Master	6	6	6
Industry			
Fashion	7	13	8
Design objects	0	1	2
Hospitality	4	3	6
Other	0	2	2
Sole founder / co-founder	4 / 7	8 / 11	7 / 11

*at time of interview

[15] This does not mean that they label themselves as 'social entrepreneurs', or even that they articulate or measure 'impact' *per se*. Due to their awareness of being embedded in a broader, diverse society, they are led to temper the aggressiveness of their messaging, as is evident in the quotes provided.

The Influence of Identity–Society (Mis)Alignment on New Firm Creation

Identity theories posit that individuals strive to behave and act in such a manner that they may achieve congruence between the meanings inherent in their identity and their behaviors and actions in entrepreneurship. In the previous section, we have looked at how the (mis)alignment between founders' identity structures, and the social structures they perceived around them, leads to three types of founders for whom venture creation is a vehicle for either *exploring* self through designing their own life as an entrepreneur, *manifesting* self in the design of their products, or *transmitting* self and values by designing society—all of these representing alternative ways in which founders act out their identities in different social structures, each founder striving to achieve identity congruence while navigating a different set of 'rules of the game'. Thus our findings that founders act out their identities is consistent with the prediction of identity theory and prior work in entrepreneurship (e.g., Fauchart & Gruber, 2011; Powell & Baker, 2017); however, going beyond the typical prediction of identity theory, we find that founders with the same identity structure may be led to different actions and strategies, in light of the way the founder's sociocultural environment influences *the way* in which founders act out the same identity structure. Namely, corresponding to the three focal identity–social structure configurations discussed earlier, our findings reveal that the way they act out their identities in function with their perceived sociocultural environment is reflected in distinct types of ventures the founders create—as evidenced along several fundamental firm dimensions: (1) the firm's offering, (2) definition of the target market, (3) construction of the value chain, and (4) the scope of innovation across the firm. In Table 2.6 we illustrate these findings using short cases of real founders in our sample. Later on, Table 2.7 will present a systematic examination of the four key venture dimensions.

Offering. Regarding the *offering,* we find variation across the identity–social structure configurations in terms of *novelty* and the founder's *readiness to adapt* the product to market feedback. Unsurprisingly, as we move from pre-modern, to early-modern, to late-modern social structures, founders' offers become increasingly innovative. Drawing examples from the fashion brand industry, the scope of novelty in the offer extended to, but did not exceed[16], patterns and prints that were new to the local market—i.e., designers bought standard fabrics but sometimes had their own prints put onto them, and cut them into new shapes and styles—among founders in a pre-modern structure. In an early-modern structure, founders also generated their own designs, but also imported materials and processes that were new to the country; and in a late-modern structure, founders went so far as to develop materials, such as new fabric blends—in cooperation with labs—based on their research into new fibers, that were new to the world. To give a better sense of the level of innovation observed, one of the founders in this group was previously employed by 3M, developing applications for a new fabric they had created. Moreover, some founders in this group developed elaborate concepts in their fashion design that touched on

[16] We refer to the "extent of the scope of innovation" observed in firms because not every firm's offering within a group was equally innovative; but there were patterns in the scope of innovation—that is to say, none in the pre-modern society exceeded newness to the firm.

philosophy; unique perspectives from their life experience that would be highly unlikely to be found anywhere else.

2.6. Short Cases – Inner-Directed Founders in different Social Structures

Inner-directed founder in a pre-modern social structure

Jie, 34, founder of a fashion brand

Jie stepped out, amidst criticism and public doubt, to go abroad to study fashion design, then returned to Taipei to establish her own fashion brand. Her studio is her haven for creative expression, and it's not unsuual to find her there at 2am. The business exists to support her personal dreams and vision. She originally designed extravagant "luxury" fashion for young professional "single women", but concedes that she had to compromise her design preference in order "to survive", establishing a line of "common, everyday clothes" catering to the desired functions of elderly people with more purchasing power. She established her venture, and sustains it, with the support of her husband and his parents. For example, she primarily sources fabric from the textile factory and import business of her parents-in-law, now managed by her husband. She sells her ready-to-wear products in retail stores, and tailor-made garments directly from her studio. She relies primarily on word-of-mouth from her friends and customers to gain clients for unique and customized, but expensive, tailored items. Jie is an important role model for artistically inclined youth in her community, whose parents and other authority figures do not see creative career options as valid. So when people come into her studio to chat and ask for career advice, she drops her work to counsel them, even when it sometimes means losing an afternoon of work and delaying her projects.

Inner-directed founder in an early-modern social structure

Kai, 35, founder of a design studio for home objects and accessories

After unrewarding initial efforts to sell the jewelry he had designed and manufactured himself, Kai followed his (Taiwanese) wife to London and decided to spend some time perfecting his English. While there, he found himself in a group of Taiwanese expatriate friends who were all "working on really great projects". They would sit around and talk about their dreams, each encouraging the others to make them a reality. Kai found this empowering, and once returned to Taiwan, set up his own studio. At the time, a design community did not exist in Taipei, so he created his market in a very "organic" way, over a number of years, through talking with and rallying people interested in design. Since his friend group included the founder of the island's biggest crowdfunding platform, as well as multiple founders behind the platform's top campaigns, Kai had access to the tools and knowledge base to raise funding for his venture. His design inspiration tends to spring from items he wants, but can't find on the market; it is important to him that products carry meaning and make a strong statement. He takes great pride and pleasure in working with unique materials, such as high performance concrete. However, as he cannot find a supplier for such materials, he developed his own production techniques and manages the fulls process. Kai regularly opens his studio to the public, hosting DIY (do-it-yourself) workshops where people can come in, see and touch the materials, and even make their own products from his collection, using moulds he provides under the supervision of his employees.

Inner-directed founders in a late-modern social structure

Wenli, 31, and Jeffrey, 31, founders of a furniture venture

Wenli and Jeffrey were exchange students in Europe during their university studies in industrial design. After they returned to Taiwan, their foreign friends visited. The pair was embarrassed when, while exploring the city, their friends started asking them why there were so many fake copies of foreign brandname furniture in the shops and marketplaces—and yet no authentic Taiwanese design. Grounded in a strong sense of who they are as designers, and saddened by the perception that Taiwanese people lack the confidence and self-respect to select and treat themselves to quality, authentic furniture, they started their own furniture company with the underlying aim to not only build a profitable business, but also teach the public about good design and encourage consumers to thoughtfully consider what they want (rather than to simply follow trends). In effect, they sell their products in a way that requires customers to be more self-directed in creating the environments for their everyday lives. Wenli and Jeffrey brought on two foreign partners to collaborate on design, and they carefully sought out manufacturers who have respect for designers intellectual property rights, which, they admit, has been the most difficult part of launching their venture. In addition to selling their products online, they partner with cafés and bookstores, where they display their furniture and give free presenations on the values behind their design. It is important to them that potential customers can try out 'living with' their furniture without the pressure of a salesperson.

Founders' *readiness to adapt* their offerings seems to correspond with both the level of innovation they infused into the product, along with how important it is for them to convey their premeditated offering to customers—which we see reflected in the identity function and society function of entrepreneurship. Recall that for founders in a pre-modern context, venture creation serves the primary function of self-exploration; accordingly, as long as they can reserve a time and place to give outlet for their creativity, they show willingness to readily adapt their offering to the market's needs. We have seen this take the form of accommodating custom orders, specially equipping a coffee shop for an unusual and slightly problematic customer, and creating a new, less expensive product line for "everyday" wear when there was not enough business for a founder-designer's beloved formal wear. Founders in an early-modern context, for whom self-manifestation in products is the key function of entrepreneurship, are less ready to adapt their offer to cater to customers' needs and whims. While they often provide, or express some openness to a certain level of customization, their attitude conveys a statement such as, "If the basic concept of this product isn't what they want, then they're not my client."

> I feel that we need to respect each other, they like my designs, my products, and I would strive to provide the best service and product quality that I can deliver… It's a form of mutual trust between us and the customer. They feel that our prices are reasonable, value-for-money, while we provide the level of service our products deserve. We don't want our customers to mistrust us just because we are running a business, assuming that we are only focused on profits. I hope to provide good service and high quality products, while they respect our products and are willing to pay a fair price for them, to receive what we have made for them… But if we ever meet a nasty customer, we would also refuse to do business with them.
> —Sirena, founder of a shoe brand

Given the pattern so far, one might expect that founders in a late-modern context show no willingness to adapt their offering—and yet, what we find is actually the opposite: founders for whom entrepreneurship serves as a means of value transmission for (re)designing society show great flexibility—and even eagerness—in understanding customers' needs, hopes, and expectations. These founders seem to understand that if they want to have an impact of any kind, they need the buy-in of customers; and so they go above and beyond to anticipate customer desires and attitudes, and make an effort to surprise customers with something new and unique. We see that founders are not willing to compromise on the underlying values carried by their firm and products, but they are very willing to engage with customers according to their needs—among which they see continuous novelty as key.

> So I sort of created the hashtag pleasant surprise, cause I want it when people see my design and product, I want people to think wow this is cool, is this new, this is something different. I want them to have this feeling, so they would [be] a little bit happy or something.
> —Stella, leather accessories brand

> I mean for me, my [redacted] brand strategy… every month I wish we can have something new. So as in new as in it's not just a new Fall or Spring season collection… we want to continuously having new ways to let customers feel new basically, because I feel like you travel to different places first of all to have fun, so you want to have new vision or new idea or new concept, I means that's the main reason why people like to travel… —Tim, founder of a travel fashion brand

> Every weekend, people would know we have new limited edition coming out and they would come and check it out…
> —Kasey, founder of a fashion brand

Market. The way founders approached *defining their market* ranged in precision and intentionality, with various degrees of willingness to respond to market feedback. Inner-directed founders in pre-modern structures tended to *predefine* target market segments, with a rather clear (precise) idea of who they are creating for, but they did not insist when the market did not respond favorably; rather, they willingly addressed the customers who were willing to pay. In response to the question, *Did you have a clear idea of who would be the retail customer segments?* the founder of a shoe company replied,

> …Of course in the very beginning we want to focus on teenagers and the people around 25 because these people they're willing to spend money. But eventually we find that this market is very difficult actually. If you're not famous enough they won't buy it, and eventually with the results actually people around 40 are our main customers, because these kind of shoes they're so comfortable… my goal is of course we want to be a famous brand, but sometimes we have to go with the flow you know.
> —Robert, shoe brand

Inner-directed founders in early-modern structures, rather than addressing existing market segments, tended to *envision in detail* the type of market they wanted to serve—for example, people with a specific taste profile, even if it did not exist locally or in Taiwan—and then work to create that market. They were responsive to market feedback, but not as immediately as founders in pre-modern structures; instead, they took a calculated approach to feedback from the market and refined their target market over time. The founder of a design objects company explains,

> Because in Taiwan, there was no creative industry before. So there [was] only OEM industry, ordinary import products. When I try to sell my own design, I need to find my own way. Everything is very organic to me. I need to find my customers. I need to stop to sell on the street. Because there was no select shops I can talk with. There's only people who's interested in design. So I found it by myself. —Kai, design objects firm founder

Finally, inner-directed founders in late-modern structures tended to begin with only a *broad conceptualization* of their target market, planning to research and experiment to discover a market that they assumed would continue to evolve and expand. For example, several of these founders, like Jeffrey and Wenli, who launched a furniture company, have used crowdfunding primarily as a tool for discovering whether there was a market for their offering:

> **Jeffrey**: At the beginning I told you that we try to make something that can really influence the people's daily life, so we choose furniture, so it's for, mostly is for the society. For the Taiwanese people they can have the good quality designer product with the reasonable price, so yeah we don't sell it to our family.
> **Wenli**: We start our first business from the Crowdfunding in Taiwan, so at the very beginning, our family and friend they are worry about us.
> **Jeffrey**: They try to buy the product from us
> **Wenli**: To help us
> **Jeffrey**: We don't sell [to] them
> **Wenli**: We said don't, don't do it … the reason why we try [to] first sell from crowdfunding is because we want to know the market in Taiwan—if there is a market there or [if it] is our imagination. So we want to know if it's a real market there. So if our friends or family buy the product for us, we will never know.

Value Chain. We also find interesting variation in how founders in different identity–social structure configurations develop their *value chain*, including the suppliers, partners, and producers of their products and services. Specifically, we find that the value chain is managed around a different organizing theme in each context. For inner-directed founders in a pre-modern context, this is *relationships*—their suppliers are individuals and firms that they already know, or whom they intentionally get to know. The ability to develop and maintain a good (fair, trustworthy) relationship with production partners—one that goes beyond the transaction—is vital to them.

> Another criterion is picking people. You have to build a relationship with your suppliers. If they're not very sincere, it would feel weird. We sometimes go to organic markets to find food or tea. Some of the teas are really expensive, and the way they promote it feels fake. Then we wouldn't pick them. Some other suppliers seem sincere and real… But yes, I would pick suppliers based on who they are. —Albert, café founder

Inner-directed founders in early-modern contexts, however, have a different approach to building their supply chain: they do not find personal relationships as crucial, but rather search for partners that meet their standards for *quality*. They may also leverage their existing relationships in the process, but these are less important, and there is no expectation that trade relationships would be anything beyond transactional. The way inner-directed founders in late-modern contexts approach building a value chain reflects the social function of *value transmission* that entrepreneurship holds for them. Rather than prioritize people they are connected to, or even those of the highest quality, founders with inner-directed identity structures in late-modern structures tend to choose suppliers and collaborators, first and foremost, based on *shared values*. Quality is not unimportant, but shared *values* are the driving criteria for selecting value chain partners. While founders in late-modern contexts do not necessarily have more control over the value chain than founders in other groups, they emphasized the importance of this, and cited this reasoning as a core driver for vertical integration, more than founders in other contexts.

2.7. Prototypical Firm Characteristics Generated by Various Founder Identity–Social Structure Configurations

Identity–Social Structure Configuration	Inner-directed in Pre-modern Structure	Inner-directed in Early-modern Structure	Inner-directed in Late-modern Structure
Key Venture Dimensions			
Offer	- offer is new to local market - original offer is born out of founder exploration and experimentation, but readily adapted, indiscriminately, to market needs	- offer is new to country - original offer is born out of founder product vision, and adapted to market needs at founder's discretion	- offer is new to country or new to world - original offer is born out of founder's vision for society; the underlying value base of their offer is non-negotiable, but the packing and delivery of the offer is eagerly adapted to market needs
Market	market is predefined, but readily modified based on customer willingness to pay	market is envisioned in detail, then created by founder's carefully chosen actions; it is refined over time in a calculated way	market is broadly conceptualized, then discovered over time and iteration, with an openness to evolution and expansion
Value Chain	suppliers and collaborators are selected based on relationships	suppliers and collaborators are selected based on quality	suppliers and collaborators are selected based on shared values
Scope of Innovation	innovation is limited to configuration of the tangible product	innovation spans the offer and production process	innovation is systemic, entailing multiple aspects of the business model

Reading the table from left to right, an intriguing pattern emerges across the venture dimensions. The progression from left to right columns represents the path of socioeconomic development charted by Riesman (1950), Giddens (1991), and Gergen (1991)—and is reflected in the path of Taiwan's development as well, so we observe these patterns in the same manner. In the pre-modern context, founders' (identity-based) products are the product of exploration (hence, initially not well defined), and others (the market) are narrowly defined. We see this contrasted in the late-modern context, where (identity-based) products are precisely defined (e.g., the value base) and others (the market) are broadly defined and constantly evolving. This observation draws the link to the final venture dimension—*scope of innovation in the venture*. Moving from a paradigm wherein products are relatively exploratory, to one where the products are firmly anchored, may redirect the focus of creativity and innovation (which has been, in a pre-modern context, focused primarily on exploring who the founder is and what she may create), allowing creative attention to be focused elsewhere. Redirecting creative attention away from the founder's own identity and increasingly toward their business appears to lead to expansion of innovative thinking from the product alone to the way in which the product is produced, presented to the market (e.g., the core message, which becomes increasingly important in early-modern and late-modern contexts), and delivered to customers.

In parallel to the (identity-based) foundation for products becoming more solidified as we move from a pre-modern, to early-modern, to late-modern context, we see the foundation for defining one's market moving in the opposite direction—becoming less firm, less known, less certain. This uncertainty in the market also broadens the scope of innovation in the firm, demanding creative attention from the founder to not only make her value system manifest in the product she designs, but also relevant in the way it is presented and delivered to an audience whom she is continuously discovering. Thus, moving from a paradigm in which the market is predefined to one in which it is continuously discovered, we see the scope of innovation in firms move from one where innovating the tangible product alone is the focus (to "wow" the local market), toward one in which innovation becomes systemic as founders seek to bring a well-established value base to a continuously evolving society.

The overall point these observations allow us to make is that the type of venture that is created is heavily influenced by the way individuals express their identities as founders—expressions which are not only dependent on identity itself, but also the dynamics between that identity and the surrounding sociocultural environment. Launching a venture is an inherently social activity: no man is an island, and certainly no entrepreneur is an island. It is not just about "who I am"—but also "who I am in relation to my social context" that shapes entrepreneurship.

DISCUSSION AND CONCLUSION

By adopting an identity perspective, scholars have been able to significantly increase our knowledge of enterprising individuals and the organizations they create. In the present study, we went beyond the Western context of most prior research on founder identity and examined founder identity in a non-Western society that (almost acting as a sort of 'time machine') provided a window into venturing within social structures that exist in present-day non-Western societies but are difficult to observe in the West, enabling us to broaden our theoretical understanding of this important concept and its implications for new firm creation. In particular, the empirical context of Taiwan allowed us to access a range of social structures and to observe how founder identities function in these different social structures to produce a variety of attitudes, practices, and firm characteristics.

Our inductive approach to investigating founders' perceptions of their sociocultural context—and of themselves in that context—yielded three distinct social structures: a pre-modern, an early-modern, and a late-modern structure. This initial finding was accompanied by evidence of founders' *self-emancipation* from the pre-modern context, *reinforcement* of founders' inner-directed identities in the early-modern context, *tensions* between founders' inner-directed identities and the 'rules of the game' of both the pre-modern and late-modern contexts, as well as intriguing evidence of varying degrees of acceptance of, or commitment to, a level of inherent and enduring *embeddedness* of their business activities in their social context—even in light of self-emancipation and enduring tensions. The body of literature synthesized in Côté's (1996) framework helped us to understand *why* founders were experiencing reinforcement or tensions—namely, due to (*mis)alignment* between their identity structure and the social structure of the environment they perceived and interacted with—and, moreover, pointed us to macro- and micro-level forces at the source of such reinforcement or tensions. The literature suggested that social structures "set the parameters of identity formation" (Côté, 1996: 418) for individuals, yet many founders in our sample displayed identities formed *outside* the parameters of the social structures they perceived. Our investigation of various identity–social structure configurations revealed three main types with distinct patterns in the *identity function* and *social function* of venturing for founders, and systematic variation in their ventures across their *offering, market, value chain,* and the overall *scope of innovation* in the firm.

Taken together, our findings allow us to offer new insights for theory development in the entrepreneurship and organizational literatures, and also to provide key insights for identity research.

Implications for Entrepreneurship and Organizational Research

Our findings provide a number of distinct contributions to entrepreneurship and organizational research. First, by moving beyond the Western context, the findings of this study not only help to put existing insights on founder identity into perspective, but also to significantly advance our understanding of the role that founder identity has in society and in venturing. In particular, the framework we develop in this study allows for the integration of prior research into an overarching framework for the study of founder identity across sociocultural contexts. For example, consistent with Slade Shantz, Kistruck and Zietsma's (2018: 417) findings that "some social contexts impose more obligations and constraints on entrepreneurship than others", we note that their sample, drawn from rural villages in Ghana—as well as the contexts to which they generalize their findings, including "ethnic enclaves, immigrant communities, rural areas, remote regions, or Indigenous communities"—fit the description of a pre-modern, agrarian context, and reflect our finding that such social structures carry the most perceived obligations and constraints for founders.

Second, because the social structures (be they pre-modern, early-modern, or post-modern) are present in the focal country at the same point in time, our results allow us to identify a mechanism to explain how founder identity interacts with perceived social structure, and what this means for entrepreneurial decisions. Depending on the alignment or misalignment between the founder's identity and perception of her social structure, we observe important *reinforcement* or *tensions* within founders as they observe society and interact with others, and distinct "expressions" of these identity–society dynamics in both the meaning that venture creation holds for them and in their entrepreneurial activities (in terms of key differences across fundamental firm dimensions).

Third, our findings can be seen as providing a "window" into the meaning and function of entrepreneurship for founders across historical periods. This is because the pre-modern, early-modern, and late-modern social structures chart the path of socioeconomic development—which is somewhat universal: the West has made this progression in a linear manner; non-Western countries follow the same path, however tend to do so in a more fragmented and less linear manner. As societies evolve, the theory of founder identity–society (mis)alignment developed here suggests patterns for the implications of this societal evolution on the nature of venturing, including the function of entrepreneurship both for the individual entrepreneur and for society. In this regard, we contribute to a body of knowledge that will begin to allow us to sketch out a long-term cycle of how sociocultural environments influence founders, who in turn shape organizations that collectively influence the environment around them.

Fourth, the patterns we see in the orientation of founders and their firms toward their surrounding environment—indeed, the meaning and function of firm creation in each social structural context—reflect the evolution of organization theory from its origins at the turn of the 19th century, through to the present day. Recalling that Western society—in which organization theory has largely developed—has progressed linearly through the traditional agrarian society to industrialization, into the post-industrial present day, and in light of the founder attitudes and venture orientations this study reveals in each structure, it is no surprise that we can observe intriguing parallels between our findings and key advances made in organization theory over the course of the last century, as reflected in Hatch (2018). In particular, we can understand Adam Smith's division of labor as in step with the increasing individualism in the early-modern structure, Karl Marx' emphasis on power relations as a response to the redistribution (democratization) of capital and power during this early-modern industrialization, Emile Durkheim's addendum of hierarchy to the division of labor as a response to the increasing complexity in societies moving from simple, top-down pre-modern structures, into an early-modern social structures which could have seemed almost anarchic in comparison. Max Weber's rational-legal authority structure reiterates the replacement of the traditional authority in nepotistic, relationship-based pre-modern societies by rationale and decision-making based on individual merit in the early-modern social structure. Theories based on self-government, such as that by Mary Parker Follett, and the concept of holarchy—decentralized or 'flat' management, made popular by the Holacracy system—reflect an embrace of the democratic early-modern society[17]. Finally, Henri Fayol's 'esprit de corps' and the subsequent interest in organizational culture and identity can be seen as reflective as the breakdown of structures guiding individual identity development in the late-modern society, giving organizations the opportunity—perhaps even the imperative—to provide bases for collective identity and nurture members' identity work. Furthermore, we observe intriguing parallels between the evolution of these theories from a focus on product and production efficiencies toward increasing system, and our empirical findings on the scope of the innovation in ventures moving from product-focus in a pre-modern social structure, to process-focus in an early-

[17] Andreas von der Heyt (2019) inspired reflection on the parallels between our findings and these evolutionary steps in organization theory; many of his ideas, based on the scholarly work of Mary Jo Hatch (2018), are reflected here.

modern social structure, to systemic firm-wide innovation focus in a late-modern structure.

Implications for Identity Research

Our findings also allow us to contribute to identity research – in no small part because entrepreneurs fulfill important roles within society as they and their firm-related activities are both shaped by the sociocultural environment and will in turn shape the evolution of this environment. Viewed from this angle, it seems to us that the ideas embedded in our theory of founder identity–society (mis)alignment developed in this study tend to be more broadly applicable and can perhaps explain how all sorts of individuals may be reinforced by their perceived social structures or experience important tensions. Interestingly, the empirical phenomenon of entrepreneurship seems to be one in which these forces tend to become explicit and thus more transparent and observable. Our study thus can serve as an example of how the entrepreneurial setting likely holds important insights for advancing identity research more broadly. Case in point: whereas prior work has posited that sociocultural context "set[s] the parameters of identity formation" (Côté, 1996: 418) for any type of individual, our data suggests that an unusually high prevalence of counter examples may be found among entrepreneurs, and that, in such cases, the tensions encountered by these counter-culture founders are systematic experiences.

Furthermore, our study helps to advance research at the intersection between identity and society. Our interpretive approach to data analysis, with the aim to fuse the horizons (Gadamer, 1989) of Taiwanese founders and management scholars, unexpectedly revealed more encompassing and "bigger" ideas. While indigenous psychologists (e.g., Hwang, 2004; Poortinga, 1999) and anthropologists tend to criticize cross-cultural research for its generally *etic* approach—seeking to compare all cultures across the same dimensions and from an outsider's perspective—we show that an inductive, interpretive, *emic* approach—seeking to understand a culture from the inside, e.g. based on narratives from insiders rather than an outsider-researcher's observations—can also lead to dimensions that are comparable within a higher-level, etic framework such as Côté's (1996) culture-identity link. In that sense, we feel that in this study we have achieved communicating Taiwanese founders' personal perspectives of themselves and their lifeworlds, while—in a somewhat serendipitous coincidence—being able to link the emergent themes to comparable prior work in other sociocultural contexts.

Limitations and Opportunities for Future Research

Several limitations need to be considered when interpreting the findings of our study. First, we did not observe founders with each of the three identity structures in every social structure (see Table 2.2), driving us to limit our systematic comparison to the inner-directed identity structure—which we observed across all three social structures. While tradition-directed (ascribed) identity structures seem less likely to lead individuals into entrepreneurship, especially in early- and late-modern contexts, future studies may seek out such founders to test the hypothesis that such firms would possess relatively low levels of innovativeness (e.g., new to the firm only). We did observe founders with image-directed (managed) identity structures who perceived multiple social structures, suggesting that a focal study on such firms could yield additional insights. With regards to both inner-directed (achieved) and image-directed (managed) identity structures, it would be particularly interesting to understand whether these founders experience benefits from *reinforcement* of their identity structure in pre-modern and late-modern societies, respectively (i.e., when their identity structures are aligned with their perceived social structure)—as we find with founders who have inner-directed identity structures in alignment with an early-modern social structure.

Future research may also look at the dynamics of identity–society alignment over time in relation to the entrepreneurial process, including motivations and actual venture creation. Founders' accounts of important life experiences show change over time in "how experience is handled as well as… what experiences are considered important"—Marcia's definition of *identity structure* (1993:3). In fact, not all of the founders in our focal sample have always had inner-directed identity structures; many tell stories of important life events that directed them away from one identity structure toward their present identity structure. Furthermore, these shifts in identity structure appear to be closely tied to both nascent motivations to start a new venture and the actual act of firm creation. While the present study was designed to investigate founders' identities at the time of the interviews, a future, longitudinal, study may further uncover the role of identity shift in innovative firm creation—a relationship which may be characterized by a feedback loop (two-way causation).

Conclusions

We began this paper by noting that the pursuit of an entrepreneurial activity offers individuals freedom in choosing which economic activities they want to pursue, the way in which they want to pursue them, and the goals they seek to achieve with their new firms. In other words, entrepreneurial activities allow individuals to put a lot of who they are—their identity—and the associated meanings into the venture creation process. The findings of the present study not only allowed us to extend existing research beyond the Western context, but the different perspectives encountered in the East Asian context enabled findings that gave rise to a theory of founder identity–society (mis)alignment. This theory adds a higher level to current theorizing on the role of founder identity in the creation of new organizations, as it enables scholars to understand identity in its sociocultural context. Due to the very nature of the relationship (alignment vs. misalignment), this theory provides insights into how entrepreneurship is affected by societal structures and, by implication, can also contribute to an evolution of societal structures. Given the fundamental nature of these insights, we encourage future researchers to embrace a perspective on founder identity that is deeply embedded in the sociocultural environment. As the poet John Donne remarked already in 1624: "No man is an island."

Chapter 3

Culture, Psychology and Organization Studies: Four Alternative Packaged Approaches

SHIRAH FOY[18]

Abstract

In response to significant interest in considering cultural and psychological phenomena in organization studies, and the relatively high entry barriers related to familiarizing oneself with the relevant literature scattered across multiple fields, the present study summarizes four "packaged" approaches that management scholars can adopt in their studies of organizations *within* and *across* cultural contexts. These packages, differentiated by their positions on the *nature* of culture (its definition, locus) and the *comparability* of cultures, can be employed to generate particular types of knowledge about organizations and their members. The merits and limitations of each are reviewed, and examples from the management literature are provided. Numerous opportunities remain to extend organization theory by working toward culture-inclusive models.

[18] The entirety of this chapter represents the work of the author of this thesis. I wish to thank Davide Bavato, Enrico Bergamini, Julia Binder, Marc Gruber, Christina Hertel, Nettra Pan, and Anna Wagenschwanz for constructive feedback on earlier versions of this study.

The culture of a people is an ensemble of texts, themselves ensembles, which the [researcher] strains to read over the shoulders of those to whom they properly belong… Societies, like lives, contain their own interpretations. One has only to learn how to gain access to them.
–Clifford Geertz, in *The Interpretation of Cultures* (1972: 452-453)

It must be stressed that "culture" is not a thing, but a social construct vaguely referring to a vastly complex set of phenomena.
–Gustav Jahoda (2012: 300)

The behavioral sciences are facing a fundamental problem of generalizability (Henrich, Heine & Norenzayan, 2010). Prominent theories—almost all of which have been developed in the West—are routinely exported and applied, their frameworks, typologies, and scales "transplanted blindly" into settings where they are often found to be "irrelevant, inappropriate, or incompatible" (Hwang, 2011; Sinha, 1984; 1986). A review of psychological samples in top journals found that an overwhelming 96% of studies draw from "Western, Educated, Industrialized, Rich, Democratic (WEIRD[19]) societies, which house only 12% of the world's population" (Hwang, 2011:329; Henrich et al., 2010). The acronym is not meant to pass judgment, but rather reflect the reality of the "exceptional nature" of individuals from WEIRD societies, who are frequent outliers in studies spanning "visual perception, fairness, cooperation, spatial reasoning, categorization and inferential induction, moral reasoning, reasoning styles, self-concepts and related motivations" (Henrich et al., 2010: 83, 61)—domains which are germane to theories used in management to understand individuals' creation of, and engagement with, organizations. For management scholars, working with theories that make potentially false assumptions about the way organization members see themselves and the world means that—though our methods may be rigorous and our findings of organizational outcomes valid—the *mechanisms* through which we theorize such outcomes in non-WEIRD contexts may be flawed. In other words, while mainstream psychological theories provide a solid foundation for studying organization members in WEIRD contexts; they run the risk of irrelevance or incompatibility when we use them to theorize about organization members and founders who inhabit or operate outside the realm of WEIRD societies.

Management scholars have shown considerable interest in understanding the impact of cultural variation on organizational psychology and behavior. Culture—defined alternatively as a "collective programming of the mind" (Hofstede, 1993:89), a system of shared meanings (Shweder & LeVine, 1984), a "shared knowledge structure" (Erez & Earley, 1993:23), and an "emerge[nt]… set of discourses, images, and ideas" (Nova 2003:265)—has been shown to have important implications for organizational outcomes due to its influence on the way organization members function on their own and in groups, via mechanisms such as person-environment fit (Lee, Reiche & Song, 2010), social class

[19] In line with Henrich and colleagues' (2010) coining of the term 'WEIRD', the acronym is meant to allude to the "exceptional nature" of the sample and does "not intend any negative connotations or moral judgments" (p.83).

imprinting on risk-taking preferences (Kish-Gephart & Campbell, 2015), and individuals' identities (e.g. Erez & Earley, 1993; Lee, Masuda, Fu & Reiche, 2017; Foy & Gruber, Chapter 2 of this thesis). Since Smircich suggested in her (1983) review that "the culture concept is highly suggestive and promising for many different ends that researchers pursue" (p. 340), research has blossomed in streams such as cross-cultural industrial/organizational behavior (CCIO/OB), international business, and journals with a particular international or contextual focus. In light of the increasing evidence that cultural factors form an important variable in basic human variation (Henrich et al., 2010; Nisbett et al., 2001; Nisbett, 2004), a basic understanding of the challenges and opportunities they present for management research more broadly are vital for maintaining relevant organization studies in the twenty-first century.

Despite interest in engaging with culture and psychology in management research, there are relatively high barriers to entry for organization scholars. The literature on culture and psychology spans over a hundred years and a number of different disciplines, including anthropology, psychology, and sociology. The field of psychology has quite clearly defined psychological phenomena and a management scholar is likely to have relatively little trouble determining what psychological processes she could study within an organization—e.g., perceptions, personality, emotions, sensemaking, identity, values, etc. (cf. Finch et al., 2015; Gardner & Martinko, 1996; Gruber & Fauchart, 2011; Weick, 1993). Fields that have historically developed around the study of culture, however, continue to debate fundamental questions, such as "What is culture?" and "Are cultures comparable?" This is not to say that there has been no progress; on the contrary, a number of disciplines have developed myriad theories of culture based on a variety of responses to these fundamental questions. The present situation, therefore, presents multiple alternative approaches to studying culture that could be adopted by management scholars seeking to understand how cultural and psychological factors interact in organizations. In line with the call of prominent cross-cultural psychologist Gustav Jahoda (2012), the aim of this study is to provide perspectives on the usefulness of different approaches, rather than make another "futile" attempt at defining culture in any definite way (Lang, 1997:389). This study serves to summarize the main approaches available to management scholars[20], delineate these approaches based on a discussion of key dimensions along which they differ, and elaborate on the types of organizational knowledge that can be produced with each approach.

Accordingly, the study is organized into three main sections. First, I introduce the idea of packaged approaches, including philosophical foundations and their assumptions about the nature of social reality. I walk the reader through two key questions whose responses distinguish the various packaged approaches. Second, I present four packaged approaches for studying culture and psychology, comparing the aims, methodologies, merits and limitations of each tradition, alongside examples from organization studies[21] that have employed each of the approaches. I close this section with a discussion of how

[20] Drawing on key reviews within various psychological literatures

[21] While many of the examples given are drawn from the entrepreneurship literature, the principles remain relevant for the broader community of organization scholars.

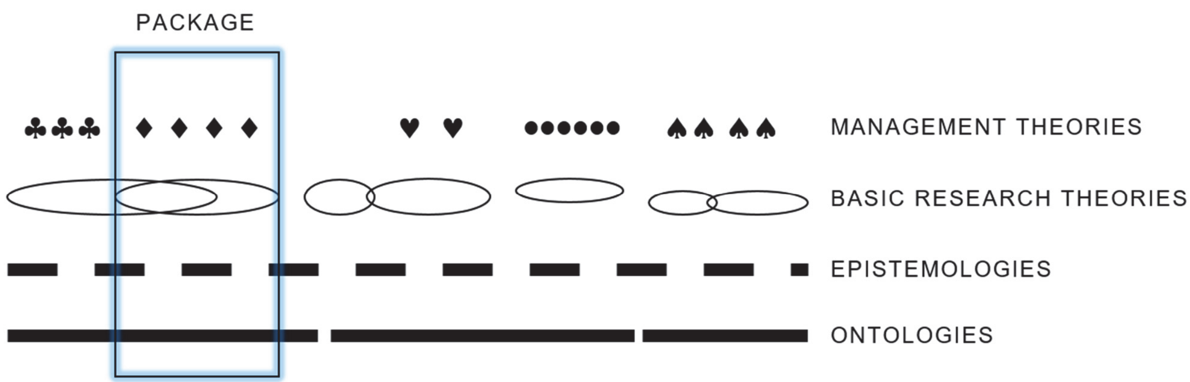
knowledge generated with each approach is being, and can be further, integrated to broaden our overall understanding of organizational phenomena across sociocultural contexts. Third, I provide a practical example of navigating the various approaches to culture and psychology as a management scholar. This study contributes a conceptual review of the alternative options available to management scholars seeking to account for the sociocultural contexts of their informants and focal organizations. My hope is that this will serve as a practical resource with regard to the types of knowledge that can be generated about organizing across sociocultural contexts as we work toward building culture-inclusive theories.

Approaches to Studying Culture and Psychology Come in Packages

An overwhelming number of conceptualizations of "culture" exist—most sharing some broad commonalities, but many differentiated by a particular locus of focus. For example, a mid-20th century study reviewed more than 160 definitions of culture (Kroeber & Kluckhohn, 1952). These various conceptualizations trickle up to management theories via their adoption and elaboration in basic sciences such as anthropology, psychology and sociology—and spinout branches of social psychology, cultural psychology, indigenous psychology, cross-cultural psychology—whose theories are then employed by organization scholars. This is illustrated in Figure 3.1, where a number of ontologies—responses to questions such as, "What is the nature of social reality?" and, particularly relevant here, "What is the nature of cultural reality?"—are portrayed as the underlying foundation for scientific inquiry (Neurath, 1929/2003). An ontology's accepted epistemologies—or ways of knowing and discovering reality—form a second layer. Smircich and Stubbart (1985) give an example of ontological-epistemological pairings in their review of organizational environments as objective, perceived, or enacted. Most management theories are extensions of theories pertaining to human behavior developed in the basic social sciences, and, to a lesser extent, in the natural sciences (e.g., population ecology [Hannan & Freeman, 1977]). Management theories—both existing and under development—that might explain or predict organization members' psychological and behavioral processes in relation to cultural factors thus entail a "package" including the assumptions of their underlying basic theories, epistemologies, and ontology. Rather than simply talking about approaches, I use the term "packages", or "packaged" approaches, to emphasize the linked nature of psychological and cultural theory with particular underlying assumptions about social reality.

For this reason, a thorough discussion of the "packages" available to study culture and psychology in organizations must include somewhat tedious elaborations of the differences at the levels of how each approach determines what cultural reality is (ontology) and how this reality can be known (epistemology). While ontology and epistemology are not always immediately evident, and require effort to trace the history and scholarly tradition, movement, or school of thought from which the theory emerged, a certain awareness of the underlying philosophical grounds is important for understanding what kind of "truth" is being generated, and how a study's findings and contributions may be compared or integrated with others. These packages of ontology, epistemology, and basic theories have important implications for the types of methods we employ and the types of knowledge each approach to culture can produce in organizational studies.

3.1. Various Levels that Form the Foundations of Management Theories



Two important questions divide scholars of culture. The first is of an ontological nature—What is culture?—and the second of an epistemological nature—Can we compare cultures? And if so, How? As will be made clear in the paragraphs that follow, the answers to the questions determine how a researcher approaches the relationship between culture and psychology. The four packaged approaches to studying culture and psychology each have a rich and nuanced heritage, yet for organization scholars, the most important differences between them are their answers to these two questions.

What is culture? Disagreements on the definition and scope

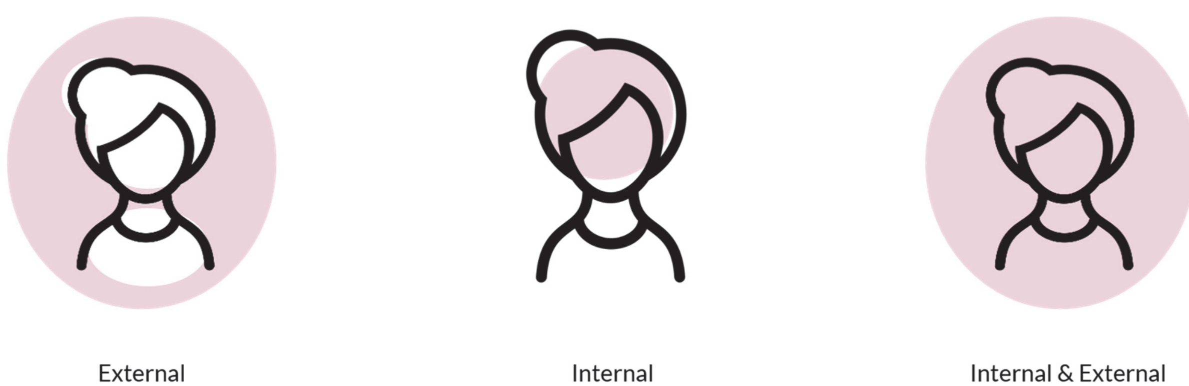
While having a variety of conceptualizations of culture to draw from is useful (Smircich, 1983), the author of a review in the journal *Culture & Psychology* concludes that "readers of these texts are liable to become rather confused" by the numerous, inconsistent, and even contradictory definitions of culture (Jahoda, 2012:300). Before discussing divergences, it is worth noting that there are some commonly accepted generalities associated with the notion. The term "culture" was first used in reference to human society, describing an educated person's refinement, training, and elevated taste in the eighteenth century—all associations which have persisted. Nineteenth century anthropologist Edward Tylor gave an early definition that emphasized "Culture, or civilization…" as "that *complex whole* which includes... *capacities acquired by man as a member of society*" (Tylor, 1871/1958:1; emphasis added). One of the most influential conceptualizations of culture (Jahoda, 2012), from the mid-twentieth century, was based on a review of 164 definitions of culture and proposed by Kroeber and Kluckhohn: "Culture consists of *patterns*, explicit and implicit, of and for behavior acquired and transmitted by *symbols*, constituting the distinctive achievements of human groups, including their embodiments in artifacts; the essential core of culture consists of traditional (i.e., historically derived and selected) *ideas* and especially their attached *values*; cultural systems may on the one hand be considered products of action, on the other as conditioning elements of further action" (1952: 181).

The ideas of culture as a complex aggregation of shared elements, notably those which are unique to humankind (as opposed to animals), and both acquired and transmitted by people, are not generally disputed. Assumptions about whether culture may change are sometimes, but not always, stated in definitions—but once a definition is stated this is empirically testable and thus not a core concern here. On the other hand, of critical concern is the scope of the definition—i.e. "where" culture is located. Jahoda (2012) developed multiple categories, based on the assumed locus of culture, which are particularly relevant to our present discussion because of the way each conceptualization of culture positions the construct as inherently psychological, or inherently non-psychological.

A first category of definitions positions culture *externally,* outside of the mind. Well known cultural values researcher Shalom Schwartz is very explicit on this point: "I view culture as a latent, hypothetical variable that we can measure only through its manifestations... In this view, culture is outside the individual. It is not located in the minds and actions of individual people. Rather, it refers to the press to which individuals are exposed by virtue of living in a particular social system" (2009: 128). Similarly, Cole and Parker write, "[We] think of culture as a dynamically changing environment" (2011: 135), while Herskovits (1949) defines culture as "the man-made part of the human environment".

A second category of definitions positions culture *internally*, as being primarily located within the minds of individuals. Prominent anthropologist Clifford Geertz spoke of "culture in the mind of the people" (1973: 226), echoed in Bruner's definition of culture as "a way of knowing, of construing the world and others" (1993: 516). Cultural psychologists Shweder and LeVine shared this view, defining culture as a shared-meaning system that provides members of the same culture group with interpretations and evaluations of situations and events (1984); their definition was adopted by Erez and Earley for the development of their model of cross-cultural industrial-organizational (I/O) psychology (1993). Also in this category is Hofstede's conceptualization of culture as a "collective programming of the mind" (1993:89), a definition which has often been adopted by management scholars. Scholars who view culture as a primarily psychological (or social psychological) phenomenon may not necessarily dismiss claims with regard to external representations of culture—such as religious systems and their tangible artefacts, to give one example—yet, their research focus is clearly anchored on the human mind.

3.2. Locus of "culture" in competing conceptualizations



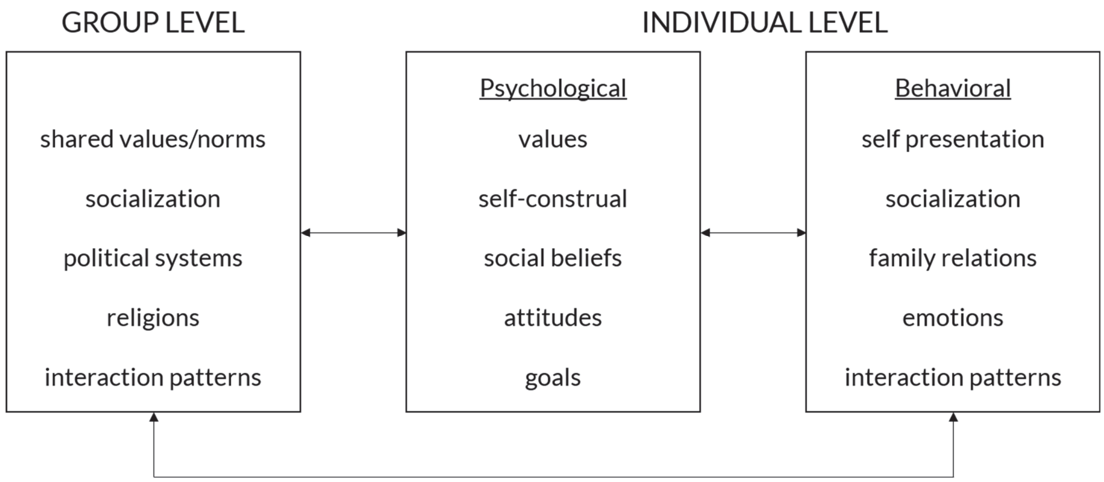
A third category of definitions positions culture *both internally and externally,* painting a picture of individuals as sponges fully submerged in a sort of cultural liquid that both surrounds and saturates us. For example, Chiu and colleagues evoke *ideas* (internal) and *practices* (external) when defining culture as "an evolved constellation of loosely organized ideas and practices that are shared (albeit imperfectly) among a collection of interdependent individuals and transmitted across generations for the purpose of coordinating individual goal pursuits in collective living" (Chiu, Gelfand, Yamagishi, Shteynberg, & Wan, 2010:482). They give examples of these shared ideas and practices at various levels of culture, including "supra-individual… tangible, public representations", "intersubjective… beliefs and values", and "internalized, individual-level characteristics" (Chiu, Gelfand, Yamagishi, Shteynberg, & Wan, 2010:482). In some studies, authors consecutively cite multiple definitions of culture, one placing its locus internally, another externally, without identifying one which they favor (cf. Keith, 2011: 3; Berry et al., 2011: 4, 225-229). Based on their non-specificity, we can assume that citing multiple definitions denotes either an endorsement of both views, indifference, or ignorance of the particularities and implications of each.

A vision for the future of cross-cultural psychology research has been portrayed as the increasing incorporation of multiple conceptualizations of culture as well as theory development to bridge multiple levels of analysis (Singelis, 2000). Figure 3.3 illustrates Singelis' integration of notions of culture as both external (e.g., interaction patterns; behavioral factors more broadly) and internal (e.g., values; emotions; psychological factors more broadly), at both group and individual levels. The sheer number of constructs in the model reiterate Jahoda's reminder that, "It must be stressed that "culture" is not a thing, but a social construct vaguely referring to a vastly complex set of phenomena" (2012: 300). Thus, adopting a notion of culture that includes both its internal *and* external aspects is the most comprehensive and pragmatic way to continue. Rather than suggesting any one most "correct" definition, Jahoda cites Alfred Lang's (1997: 389) conclusion that "attempts at defining culture in a definite way are futile" and suggests that "it is quite practicable and defensible simply to *use* the term without seeking to define it"—with the caveat that, "if either for a theoretical or empirical reason clarification in essential, then the author should explain the specific manner in which she employs the term 'culture' in that particular context" (Jahoda, 2012: 300).

When it comes to studying the interaction of culture and psychology—in an organizational setting or otherwise—the way researchers conceptualize culture matters immensely, not only for their own theorizing, but also to discern which prior work is relevant in terms of advancing the conversation. Among the notable implications of using each of these conceptualizations, there are assumptions about structure and agency. For example, a view of culture as external emphasizes the agency of individuals (compatible with much of mainstream psychology), while a view of culture as internal emphasizes the influence of structure around us (compatible with many sociological theories), and a view of culture as both internal and external is highly compatible with Giddens' (1984, 1991) structuration theory, which assumes an interdependency between individual reflexivity and social structure.

Before aligning these conceptualizations of culture with the alternative packaged approaches to studying psychology, we turn to the question of the comparability of various cultures.

3.3. A Basic Model of Culture With Some of Its Aspects and Influences
(reproduced from Singelis, 2000: 86)



Are cultures comparable at all? Disagreements about culture-specific and universal elements, and appropriate methods to study them

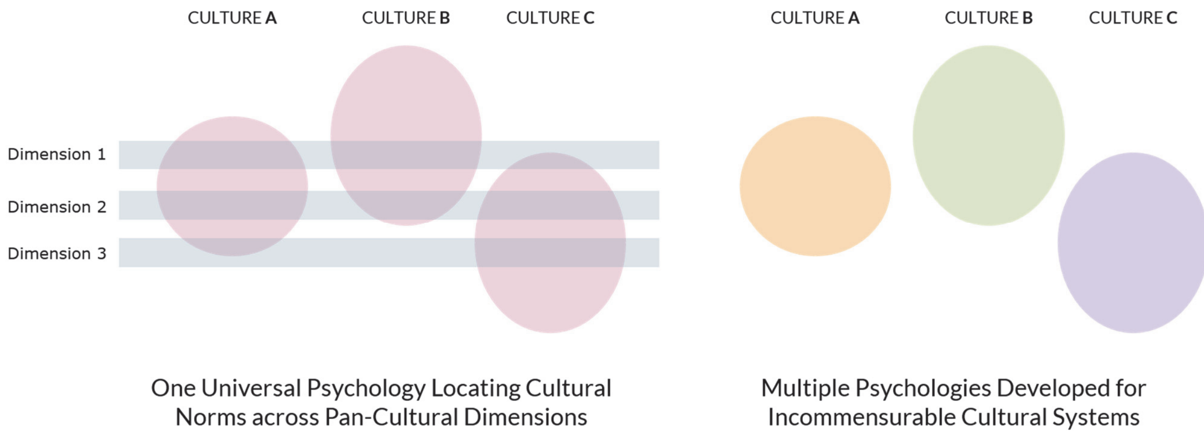
To further complicate the management scholar's endeavor to investigate organizational phenomena in light of their cultural contexts, researchers across various domains investigating psychological and behavioral phenomena in the context of culture (i.e. cultural anthropologists, cultural psychologists, indigenous psychologists, cross-cultural psychologists, cross-cultural social psychologists, etc.) are of two minds about *whether* and *how* aspects of culture can be compared across groups. Indeed, a "cultural-inclusive psychology has been … an elusive goal" (Cole, 1996: 7-8).

On one hand, cross-cultural psychologists, inspired by comparative anthropology, have sought to compare individuals' cognition and behavior across cultures along what they see as *pan-cultural dimensions*. The initial logic is straightforward: We understand others in terms of ourselves, from our own vantage points—how do others compare to us? However, a few problems have arisen in the use of this approach: First, scholars in this tradition tend to take labels such as national political borders as a proxy for cultural group (rather than looking at more natural social group boundaries along the lines of linguistic, historical, ethnic, or religious differences). Second, they tend to take tools developed in one context (generally a WEIRD context) somewhat blindly into other contexts, assuming the appropriateness of psychometric scales derived and developed elsewhere. While often a certain amount of care is taken to have such scales translated into the main languages of target countries, the work of Nisbett (2004) and Henrich and colleagues (2010) offers compelling evidence that word-for-word translation of a scale is seldom sufficient for guaranteeing its comprehension in a new context. Third, these so-called pan-cultural dimensions are often *imposed etics* (Berry, 1989)—that is to say, a dimension for comparison is thought up in the mind of a researcher, who then decides to investigate how multiple groups vary on that dimension without first developing an understanding of whether the concept/construct of the proposed dimension makes any sense in target cultural groups. As a result, cross-cultural psychology has been criticized for measuring and evaluating the world by western standards, with some of the harshest critiques evoking accusations of a neo-colonialist attitude. Such a critique can be illustrated with an excerpt from influential indigenous psychologist K.K. Hwang (2012: 6), who is of Taiwanese origin and has dedicated his career to building up a literature which he refers to as Chinese or Confucian psychology:

> Psychologists studying individualism–collectivism have taken European-American psychological characteristics as a frame of reference to construct their images of other cultural groups. European-Americans are situated at one end of the dimension of individualism–collectivism with their cultural and psychological characteristics as coordinates of reference for other ethnic groups around the world. The latter are situated at different locations along the dimension, suggesting that their cultural identities are so vague that their own psychological characteristics can be understood only if they are described in contrast to Americans. Therefore, Fiske (2002) criticized previous individualism–collectivism research indicating that individualism is the sum of cultural characteristics by which Americans define themselves, while collectivism was formalized to show characteristics of the antithetical other in accordance with the American ideological understanding that "[w]e are not that kind of person" (p. 84).

On the other hand, another tradition (to which Hwang belongs), argues that cultures are so unique—and solely self-interpreting—to the extent that they cannot be compared to each other in any meaningful manner, but rather must be understood as closed systems. This has been dubbed the *cultural systems approach.* Such a perspective leads to the overwhelming conclusion that one universal, unified psychology is not possible and furthermore not desirable. Instead, as illustrated in Figure 3.4, multiple *indigenous psychologies* have been put forward as the only way forward for this perspective. Indigenous psychologists tend to spend their entire career studying one specific cultural system (cf. Eckensberger; Hwang). A natural question arises regarding the level at which the incomparable system exists: A school? An organization? A neighborhood? A region speaking the same language? A nation? Clearly, adopting the most extreme point of such a perspective would have limited usefulness within organization studies. Hwang argues that "most indigenous psychologists have argued that the development of numerous indigenous psychologies is not their final goal" (2012: 10); there have been suggestions of convergence toward a *general theory* (Eckensberger, 2015; Kim et al., 2006), however in practice I have not seen evidence of such a theory emerging.

3.4. Competing conceptualizations of the comparability of cultures



These assumptions—about whether cultures are comparable along various dimensions or rather, are irreconcilable systems—have direct implications for what are considered appropriate methods for studying psychological and behavioral phenomena in their cultural context. Scholars of pan-cultural dimensions seeking variation across contexts tend to use more quantitative methods focused on, for example, "structural equivalence; [e.g.], to what extent does an instrument measure the same across different cultural contexts, as demonstrated by cross-cultural similarity or intercorrelations?" (Van de Vijver & Poortinga, 2002: 248). Scholars who carry a cultural systems view tend toward more qualitative methods because "there is a focus on the construction of meaning (the 'co-construction of reality') and the way in which [to take an example from developmental cultural psychology] infants become deeply ingrained in their own culture" (Van de Vijver & Poortinga, 2002: 248). In a conclusion that echoes Jahoda's (2012) words regarding the diversity of definitions of culture, Van de Vijver and Poortinga suggest that both approaches are useful (2002: 248):

> A perfect fit between the two approaches is neither possible nor desirable. The loss of diversity would lead to a reduction in the scope of cross-cultural research. Different ways have been proposed to formulate the relationships between cultural and culture-comparative perspectives [Poortinga and Van Hemert, 2001]; each has advantages and shortcomings. One way is the combination of elements from both. This is a pragmatic course of action, but legitimate methodological and theoretical concerns of either approach tend to be ignored in ad hoc fashion. Another way is integration of the two perspectives, but this presumes that often incompatible concerns can be captured in one overarching design. A third way is demarcation, it rests on the explicit recognition that the two perspectives may start from largely incompatible assumptions, but that empirical studies also tend to focus on different aspects of behavior.

One of the first propositions attempting to bridge the opposing perspectives on the comparability of cultures was proposed by cross-cultural psychologist

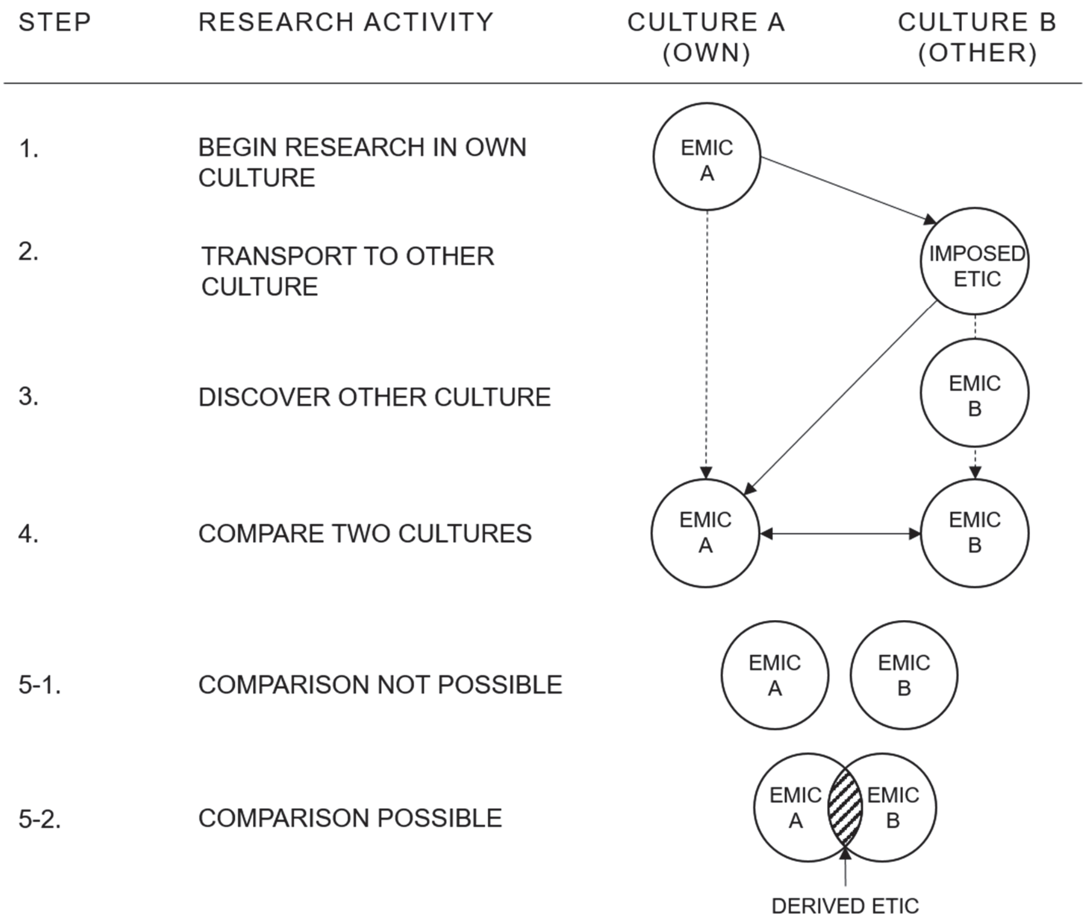
J.W. Berry (1969; 1989) and entails the three-step process of operationalizing *emics* and *etics*. These are terms adopted from the distinction in linguistics between study of phonemics—"the sounds used in a particular language", and phonetics—which gathers the particular sounds of different languages and attempts to generalize "to a universal science covering all languages" (Berry, 1969: 123; Pike, 1967). In a parallel analogy, Berry's *emic approach* studies one culture at a time with attention to its particularities. The emic approach is also the necessary first step in an eventual *etic approach*, which entails imposing a framework developed in culture A on culture B, exploring its compatibility while studying the particularities of culture B and thereby producing an *emic B*, which can then be compared with *emic A* to determine if there are comparable dimensions that represent *derived etic* knowledge. Thirty years after its specification, this process, reproduced from the original in Figure 3.5, remains the gold standard for comparative studies. Unfortunately, it is routinely cited and less often fulfilled.

An alternative process called *strangification* was more recently suggested by a group of indigenous psychologists who presented this as the central methodology of an intriguing new philosophy of science called *constructive realism* (Hwang, 2004; Kim, Yang, & Hwang, 2006). Strangification represents the process of taking models developed in one scientific microworld into new contexts, to be tested and refined (Wallner, 1998). It is primarily an exercise of scientific reflexivity, comprising a set of strategies that allow for the decontextualization, and recontexualization, of a proposition system (Wallner & Jandl, 2006). Initial steps have been taken to elaborate the method of strangification (Badie & Mahmoudi, 2007; Zhou, 2015), which remains largely theoretical with few empirical examples (exceptions are Shen, 2008; 2018). While strangification is presented as a novel approach, in practice I have found difficulty in teasing out its novel differences with respect to Berry's approach.

Responses to these fundamental questions about the nature of culture have been "packaged" into four traditions of inquiry, closely tied to the fields of cross-cultural psychology, indigenous psychologies, and cultural psychology. I have named these packages after their positions on two key dimensions—the locus and comparability of culture—rather than the fields that tend to house them at present, because while favored ontologies and epistemologies are likely to evolve over time (Kuhn, 1962), these two dimensions will help management scholars to trace contributions to each package as a coherent tradition of scientific investigation[22]. Alongside an outline of each package and its prominent contributors, I elaborate on the types of knowledge about organizations that has been and can be developed by adopting a given perspective. These are summarized side by side in Table 3.8.

[22] A history of the emergence of each of these traditions is outside the scope of this study, but enriching for she who wishes to understand the schools of thought that have contributed to each. See Eckensberger (2015) for the history of cultural psychology; Berry (1969) for the history of cross-cultural psychology; Kim and Park (2006) as well as Hwang (2012, Chapter 1) for the history of indigenous psychology, and Greenfield (2000) for an integrated discussion of the origins of all three.

3.5. Steps in Operationalizing Emics and Etics (Reproduced from Berry, 1989: 730)



Package 1: Culture as External Pan-cultural Dimensions

Despite critiques of being overly reductionist in its search for universal dimensions (Hwang, 2012, Eckensberger, 2015), it is with this package that the most prominent body of work concerning culture and psychology has been conducted. Package 1 is the reigning approach of cross-cultural psychology, a spinout from mainstream psychology that is a proudly positivist enterprise in search of objective truth, and in which the individual's subjective perspective is dubbed "bias" (Greenfield, 2000). Only recently were intersubjective perceptions—that is, "shared perceptions of the psychological characteristics that are widespread within a culture"—introduced as a "new approach" to scholars in the Package 1 tradition (Chiu et al., 2010: 482).

The Package 1 tradition is set on developing one universal psychology in which psychological orientations (such as independence/interdependence) can be measured as dependent variables and studied in relation to various dimensions describing the cultural environment (e.g., ethnic group, linguistic group, religion, national values, etc.). Culture is viewed as a set of external factors that can be captured using indices, such as Hofstede's "national culture" indices ranking 76 countries on six dimensions (Hofstede et al., 2010). Etic knowledge is clearly the desired end of Package 1 research, and while Berry's specification for attaining the ideal derived etic (see Figure 3.5) is well known, too often scholars stop at step two of the process—implementing and measuring the compatibility of an imposed etic in culture B, without exploring culture B from an emic perspective to ensure the original dimensions imposed are relevant and that the original scale(s) are appropriate for collecting data that uphold standards of internal validity.

A model example of Berry's approach in management research is Yao and colleagues' (2016) study of prototypical views of the entrepreneurial role in the United States, China, and Taiwan. Before any comparative work, they first conducted an inductive study "designed to elicit a comprehensive list of representative characteristics and behaviors that are commonly recognized in each society as typical of an 'entrepreneur'" (Yao et al., 2016: 117). They carefully derived 87 prototypical/anti-prototypical items—including those mentioned by only one, by two, and by all three country samples—and developed a survey that was administered to between 120-198 individuals in each country. Note that, in this study, "culture" is not the object of investigation; rather, culture is viewed as the sum of important environmental factors and is accounted for using the proxy of participants' country affiliation[23]. What is being measured are individuals' subjective perceptions of prototypical characteristics of entrepreneurs and employees (i.e. individual psychological orientations), which are aggregated into intersubjective prototypes of the entrepreneurial role in each country. In other words, the results of this study are not intended to further inform us on the cultural phenomena in the external environment, but rather on patterns in psychological phenomena among participants in each culture, as well as across the three cultures. Among the list of top entrepreneur prototype characteristics in each country, a number were common to two or even all three countries, suggesting that the authors generated both emic knowledge specific to each context as well as more generalizable etic knowledge.

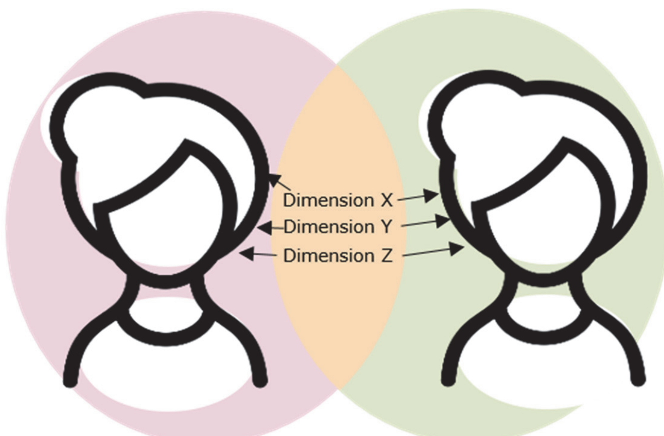
While the overwhelming majority of work in this tradition employs quantitative methods (Greenfield, 2000), Yao and colleagues (2016) demonstrate the use of supplementary qualitative inductive methods as a means to conduct rigorous quantitative research.

Organizational scholars can use the Package 1 perspective to create indices based on existing constructs and operationalizations. One such opportunity is through the use of, or addition of, psychometric scales in large scale data collection efforts such as the Global Entrepreneurship Monitor (GEM) or Global Entrepreneurial Spirit Student Survey (GUESSS). By using panel data from such surveys, scholars can account for culture using the country residence of the respondent, or alternatively, combining a number of country level datasets according to geography, linguistic group, national religion, or any number of other criteria (which are not necessarily included in the dataset but determined by the research based on other scholars' suggestions of cultural boundaries) to create "regional" or "community" data sets. One popular grouping used in economics and international business is BRIC—Brazil, Russia, India, China—a

[23] In this study, limited information was given on sampling criteria, but it should be noted that it would be difficult to attribute differences in results across country samples to cultural variation unless respondents had been screened for years spent in the country, native status, self-reported level of identification with the culture, or some other indicator of belonging to the cultural context.

group constructed based on their rapidly developing economies. The rationale for creating this group with regard to purely economic comparisons is clear; the rationale for using such a group to study organizational psychology can be found among research relating socioeconomic development to cultural stages and psychological phenomena (e.g., Côté, 1996). Another grouping might comprise MENA countries spanning the Middle East and North Africa, sometimes also referred to as the Arab World. The act of drawing the lines of within- and between-group comparison can be assumed by management scholars, that is to say, (even) by those without a necessary precedent in cross-cultural research, but—as with the development of all sampling criteria—the rationale for the groupings should be explicit and well-founded.

3.6. Package 1 investigates pan-cultural dimensions in the social environment that condition psychological orientations



Package 1 can also be used for the validation of scales for new constructs, such as Sieger and colleagues' (2016) test of an 18-item founder identity scale across 13 countries. In the case of initial tests of a scale that aim to generate etic knowledge, the results may point to a need for additional emic knowledge so that it can be determined whether multiple scales will need to be developed for specific regions, or whether a single scale will suffice by modifying the original to capture the scope of cross-cultural variation on the construct in question.

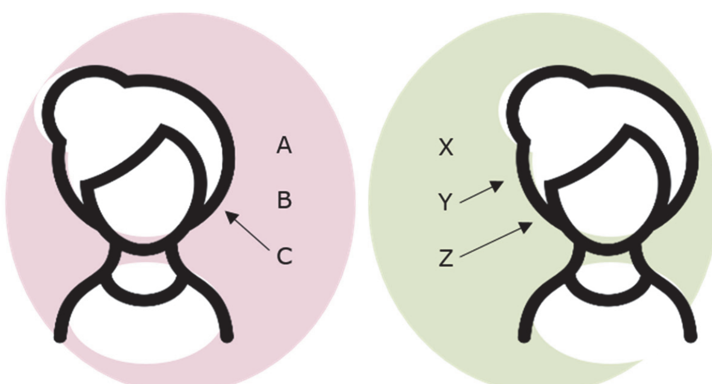
Exciting new research using this approach has investigated the cultural identity configurations of multicultural individuals (196 individuals representing 35 different nationalities) who are in leadership positions within multicultural teams, measuring the extent to which they identify with their home country, their host country, and as a global citizen, as well as their cultural intelligence (CQ) and the extent to which each leader's team perceived their leader as possessing leadership qualities (Lee, Masuda, Fu & Reiche, 2018). Their findings reveal that perceptions of strong leadership are linked to particular cultural identity configurations on the part of the leader. In addition to using multi-level data in an innovative way, this study opens up several research questions regarding global acculturation, regarding special training programs that might help individuals integrate or develop identity configurations deemed beneficial for them and their organization, and regarding further investigation of the (dis)advantages of specific identity configurations in the workplace.

Package 2: Culture as External Cultural Systems

Package 2 shares with Package 1 the view of culture as external environmental factors that can be indexed and measured with variables, however it differs in that cultures are regarded as inherently unique and—while perhaps comparable to others in some surface-level ways—truly self-interpreting systems of their own, as illustrated in Figure 3.7. Thus, while maintaining the external realism of the positivist paradigm, this package carries a hint of constructivist emphasis on the importance of meaning. Rather than working toward the Package 1 idea of a universal psychology, Package 2 insists on the need for multiple psychologies, each reflecting the unique content of a cultural system as fundamental for human psychology. According to this view, psychological concepts, theory, and data collection techniques should be developed within and for each culture, ideally by researchers (or research teams) who are native insiders of the culture under study.

This approach is typically employed in the field of indigenous psychologies, a stream of research whose origins were "part of an attempt to decolonize the mind" led by researchers inhabiting former British colonies (Greenfield, 2000: 226). Thus, there is a sociopolitical aspect to much of the research in this tradition which aims to honor, validate, and formalize "folk theories of psychological functioning" (Greenfield, 2000: 225). Indigenous psychologists have subsequently taken two approaches toward this goal, the first of which is represented here in Package 2, and the second in the subsequent Package 3.

3.7. Package 2 investigates culture-specific dimensions in the social environment that condition psychological orientations



While Package 2 has a distinctly different end goal, it shares, in practice, the generally quantitative methods of inquiry we discussed in Package 1. Culture is still accounted for using proxies or specific factors as independent variables, and psychological phenomena are still measured using scales as dependent variables; however, the source of the instruments used are important. Rather than adopting existing constructs and their scales from mainstream western psychology, scholars in the tradition of Package 2 use scales that were developed within their culture of study. It is important that both the constructs and their dimensions (or items) reflect the unique way of seeing the world that is created by the local culture. In this sense, scholars in this tradition rely on the grounded research of more interpretive and constructivist work generated by Package 3, which we will examine next.

Organization scholars who choose to adopt a Package 2 approach are able to conduct large scale quantitative studies in particular contexts, investigating idiosyncratic constructs whose instruments can be expected to have high internal validity among the population under study. For example, Lin & Ho (2009) compiled a six-item measure of Confucian Dynamism in their study of Confucian ethics as related to management of Chinese organizations[24]. Note that this study compares samples from China, Taiwan, and Hong Kong *within* a cultural system called "Chinese societies", which share a common history and philosophy (Bond, 1996; Hwang, 2012; Cua, 2013). In this respect, Package 2 studies may highly resemble those in Package 1, sometimes differing only in the way that the lines of comparability are drawn.

Despite the fact that early Package 2 researchers did not envision a universal psychology, this approach can, nevertheless, provide valuable insights to mainstream universalists by illuminating "extreme cases" of phenomena which may exist in subtler or nuanced forms in other cultural contexts.

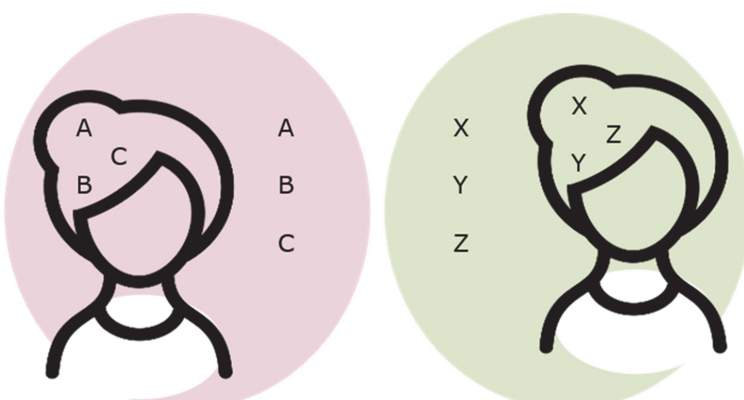
[24] In addition to the Confucian Dynamism measure, which is clearly an emic construct, Lin and Ho (2009) also employed Victor and Cullen's (1988) Ethical Climate Questionnaire (ECQ). While blindly importing this scale would be to use an imposed etic, Lin and Ho explore and explain how each of the factors in the ECQ "resembles" an element of Confucian ethics, making this a derived etic—not the ideal for Package 2, but acceptable, it seems, in the absence of completely emic scales.

		Package 1 **Culture as External Pan-cultural Dimensions**	Package 2 **Culture as External Cultural Systems**	Package 3 **Culture as Internal Cultural Systems**	Package 4 **Culture as a General Concept**
1.	***Goal***	One universal psychology valid across all cultural contexts	Multiple psychologies with own concepts, theory, and data collection techniques	Multiple psychologies with own concepts, theory, and data collection techniques	Integrate the general concept of culture into all of psychology
2.	***Philosophical foundations***	postivism	positivism, constructivism	interpretivism, constructivism	interpretivism, constructivism
3.	***Relationship between culture and psychology***	Cultural factors in the environment affect psychological orientations	Unique, non-comparable factors in each cultural affect psychological orientations	All of psychology is cultural, culture is psychological	Dialectical: they are intrinsically and mutually interconnected
4.	***Subject of study***	Environmental factors as IVs; psychological factors as DVs	Environmental factors as IVs; psychological factors as DVs	The creation of shared meaning systems (processes)	Phenomena as important cultural elements, ways of interpreting the world
5.	***Emic/Etic orientation***	Etic (when used, emic serves etic goal)	Emic only	Emic only	Integration of emic and etic
6.	***Methods***	Generally quantitative	Generally quantitative	Qualitative and grounded	Qualitative
7.	***Employed mostly in***	Cross-Cultural Psychology	Indigenous Psychologies	Indigenous Psychologies and Cultural Psychology	Cultural Psychology
8.	***Notable works***	Berry (1969, 1989); Hofstede (1980); Hofstede & Bond (1988); Schwartz (1997); Triandis (1990)	Yang & Bond (1990); Choi et al. (1993)	Enriquez (1977, 1993); Hwang (1987); Miller (2001); Doi (1963); Shweder & Miller (1985); Yang & Ho (1988)	Shweder (1991); Cole (1996); Greenfield (2000)
9.	***Type of knowledge that can be produced with respect to organizations***	- Creation of cross-cultural indices based on existing constructs and operationalizations; - Cross-cultural validation of scales and tests of management theories	- Useful for contextualizing organizing in specific contexts, such as development studies focused on a single region; - Scale validation for culture-specfic constructs	- Deep local knowledge of how (and why) organizations and their members interact; - Discovery of new concepts and constructs affecting organizational life	- Integrated, abstracted discussions of how culture is embedded into our very ways of thinking, the structures we create and recreate in organizations; - Socialization & interpretation processes
10.	***Merits***	generalizability	specific knowledge; high internal validity	specific knowledge; high internal validity	generalizable knowledge (meta-studies)
11.	***Limitations***	decontextualization: culture is a set of independent variables; the individual subject is a set of dependent variables	generalizability limited to the cultural system	generalizability limited to the cultural system	difficult to maintain high resolution culture-specific knowledge while generalizing
12.	***Exemplary org. studies papers using this approach***	Yao, Farmer & Kung-McIntyre (2016); Lee, Masuda, Fu & Reiche (2018); Huang & Bond (2012)	Lin & Ho (2009)	Xin & Pearce (1996); Cheung & King (2004); Essers & Benschop, 2009; Kim & Rousseau (2018)	Erez & Earley (1993); Smith, Conger, McMullen, Neubert (2019); Tracey (2012); Baker & Welter (2020)

Package 3: Culture as Internal Cultural Systems

Package 3 shares with Package 2 the goal of developing indigenous psychologies representing the unique concepts that constitute each cultural system, but differs radically in its view of what culture entails. Rather than a series of external, objectively observable dimensions that can be captured in variables, Package 3 views culture as inherently psychological, located within the minds of the people (Bruner, 1993; LeVine & Shweder, 1984). Bruner's definition of culture as "a way of knowing, of construing the world and others" (1993: 516) reflects this package's emphasis on the processes and content that go into creating shared meaning systems (Greenfield, 2000). The generation of *local knowledge* about the nature of worldview and of shared meaning systems in particular locations and communities drives research from this approach. Research questions often arise with practical problems within a given context, such as democratization, modernization, apartheid, discrimination, caste-system, natural disasters, and poverty and its associated problems, to name a few. Given the diversity of these phenomena, there is considerable interdisciplinarity among Package 3 studies of how people make sense, individually and collectively, of their experiences in the physical and cultural world they inhabit (Eckensberger, 2015). Having arisen with indigenous psychology, this approach shares the sociopolitical motivation discussed in Package 2, a motivation to de-colonialize, to uplift and elevate indigenous cultures as equals in a science which has largely been driven by western institutions and western-trained researchers.

3.9. Package 3 investigates the creation of shared meaning systems within specific cultures



The overarching aim to understand processes of meaning and interpretation lends itself to grounded, qualitative methodologies, including naturalistic observation, the use of video (inherited from the tradition of developmental psychology), ethnography (borrowed from anthropology), and discourse analysis (Greenfield, 2000). Takeo Doi's (1963/2004) study of the Japanese concept of *amae* ("indulgent dependency") is one example of emic knowledge generated through this approach. Doi described *amae* as "a culturally ingrained dependence on authority figures that retained a pervasive influence on all Japanese social structures" (Sparks, 2020: 1), including organizations, where Japanese workers show psychological dependence on business associates and *amae* plays a strong role in cultivating company loyalty (Hamada, 2005). Another example is Hwang's work on Confucian relationalism (1987, 2000), based on initial work to develop the concept of *guanxi* (ties in a social network; Chiao, 1982) and other indigenous concepts governing social interactions in Chinese societies. Such basic, grounded research enables the development of emic scales for studies that employ the Package 2 approach.

A considerable number of studies in management have been conducted from a Package 3 approach—even if, in addition to an emphasis on their emic knowledge contributions, they often make an effort to integrate their findings with existing etic knowledge. Jia, You and Du (2012) reviewed the contextual and theoretical contributions of thirty years of management research in China. *Guanxi* was among the three new concepts that had been introduced to management scholarship during that period, and provided a means of explaining important variation across firm types including private, state-owned, and collective-hybrid companies (Xin & Pearce, 1996). Within a similar context, Cheung and King (2004) conducted in-depth interviews with 41 Confucian entrepreneurs—defined as firm owners "who harbor the moral values of Confucianism" (p. 245)—to understand their moral choices with respect to market transactions. They found that rather than the utility maximization principle of neo-classical economics explaining their choices, moral values and virtues guided behavior at times when to do so was financially costly. Furthermore, they found that Confucian entrepreneurs made important distinctions between morality and legality.

Organization studies have also benefited from studies in the Package 3 tradition exploring the intersection of business and faith. Essers and Benschop explored the construction of entrepreneurial identities in the very specific context of "female entrepreneurs of Moroccan and Turkish origin in the Netherlands" (2009: 403), with particular attention to the entrepreneurs' negotiation of their gender, ethnic, and Muslim faith identities with respect to their entrepreneurial identities. More broadly, Gümüsay (2015) introduced an Islamic perspective on entrepreneurship, and Cornwall and Naughton (2003) offered a conceptualization of entrepreneurial success through the lens of Catholic social tradition.

Continued work in this tradition has the opportunity to contribute valuable, in-depth studies of organizational phenomena in clearly defined contexts. Scholars might wish to look at often overlooked cultural contexts, such as rural Bangladesh (Mair, Martí & Ventresca, 2012), or study sociocultural phenomena situated in a particular place and time, such as the work adaptation processes of resettled North Korean escapees confronted with capitalist work norms (Kim & Rousseau, 2018); both studies yielded important new constructs and processes for management literature. Scholars may also identify or define emerging contexts—such as the context of grand challenges (George et al., 2016; Bergamini, Foy & Gruber, Chapter 4 of this thesis) or the emergence of a global culture (Bird & Stevens, 2003) and multiculturalism (Boush, 2009; Lee et al., 2018)—and seek to understand processes of meaning and construal in these systems. Furthermore, the attention that Package 3 has traditionally given to sociopolitical issues associated with a particular community may make this approach attractive to management scholars interested in advancing the critical tradition (Steffy & Grimes, 1986; Alvesson & Willmott, 1996).

Package 4: Culture as a General Concept

The final package entails a meta-perspective on culture and psychology. Seeking to integrate the general concept of culture into all of psychology, it takes as its starting point the study of problems and procedures that "flow from the nature of culture, both in general and in specific" (Greenfield, 2000: 224). The goal is a true integration of emic and etic knowledge, through a lens that values culture as a source of—and a product of—*meaning*, both in the minds of individuals and as "a way of interpreting and representing the world" (Greenfield, 2000: 224) reflected in external structures and artefacts. This package is built upon the philosophies of interpretivism—which emphasizes social reality as subjective, interpreted by each individual, and studied by fusing the horizons of the subject and the researcher (Gadamer, 1989)—and constructivism—which emphasizes the intersubjective, socially constructed nature of cultural reality (Durkheim, 1895/2003). Through this lens, "psychological and cultural concepts are assumed to be *intrinsically* and *mutually interconnected*" (Eckensberger, 2015: 119, emphasis in original). Eckensberger writes that the "cores" of this perspective are "*intentionality* and *meaning of human actions*, as well as the *understanding* of culture as a dynamic system which is the result of human actions under certain ecological and historical conditions (and not just an independent variable)" (2015: 119, emphasis in original).

While emic-focused Package 3 is the vision of the first wave of cultural psychology, Package 4 represents the vision of the second wave. The full integration of emic and etic knowledge should be approached with a *transcultural discourse* concerning the concepts under study (Eckensberger, 1994), a sufficiently broad view so as to be able to identify abstracted processes and connections that are illustrated with the content of particular cultures. Emic and etic knowledge is integrated through the qualitative analysis and structuring of concepts and relationships that have been revealed through a variety of methods and contexts.

3.10. Package 4 seeks to understand general processes by which culture affects psychological orientations

Organization studies contain a wealth of work in this tradition. The popularity of this approach is likely due to the fact that our top journals demand theoretical contributions of the nature that tend to go beyond knowledge specific to one culture or context. Tracey (2012) raised the question of why so little work has been done to explore the relationship between religion (in general) and management. Subsequently, Smith and colleagues (2019) sketched the role of religion in entrepreneurial action, integrating emic studies of Christian and Muslim entrepreneurs with etic theorizing, and illustrating opportunities to verify and extend theoretical foundations.

Morris, Leung, Ames, and Lickel (1999) discussed the integration of emic and etic insights to produce synergetic advances in the long term. Using justice judgment as an example, they illustrate how managers in culturally diverse organizations can anticipate employees' justice sensitivities, then identify options for organizational policies, choose, and implement one.

The stream of literature on cultural entrepreneurship (Lounsbury & Glynn, 2019), whose goal is to understand cultural processes that underlie all entrepreneurial action, is also a good example of work from the Package 4 approach. This body of work has investigated the processes through which individuals and groups undertake the *making of culture*—that is, how cultural products are created, and the *deploying of culture* for the legitimation of new entrepreneurial ventures (Gehman & Soublière, 2017). Whereas mainstream entrepreneurship literature frames the individual entrepreneur and her team—i.e. a particular venture—at the heart of value creation, cultural entrepreneurship takes a broader view of the collective creation of stories that comprise cultural milieu by entrepreneurs who draw on collectively constructed stories and other cultural elements, work with them, and produce new ones. In line with the Package 4 emphasis on processes, rather than variables, cultural entrepreneurship is interested in the process of cultural change.

Erez and Earley's (1993) *Culture, Self-Identity, and Work* is one of the most comprehensive integrations of culture and psychology at work in organizations. In ten chapters, they link macro-level cultural factors with micro-level individual behavior through a theory of cultural self-representation, accounting for cross-cultural perspectives on work motivation, interpersonal communication systems within organizations, group dynamics, leadership, and conflict management.

Opportunities to use the Package 4 approach to extend theorizing in management are abundant. Parallel to the behavioral sciences' acknowledgement of context as a driving force behind individual variation, entrepreneurship scholars have awakened to the value of contextualizing theories of entrepreneurship and innovation with respect to "historical, temporal, institutional, spatial, and social contexts" (Welter, 2011: 165; Garud et al., 2014; Dencker et al., 2019; Shepherd et al., 2019; Baker & Welter, 2020). Contextual, cultural, and cross-cultural perspectives on entrepreneurial identities are beginning to emerge (cf. Anderson et al., 2018; Mazzarino, 2013; McKeever et al., 2015; Panteli & Sivunen, 2019; Zuzul & Tripsas, 2019) and will soon comprise a critical mass of work that may be progressively integrated toward a culture-inclusive model, addressing questions such as, to what extent is the range of founder social identities or role identities in a given context informed by cultural norms of independence/interdependence? With respect to integrating literature on immigrant entrepreneurship (e.g., Light, 1984; Ndofor & Priem, 2011; Vandor & Franke, 2016) and multiculturalism in organizations (e.g., Lee et al., 2010; Bosch et al., 2013; Lee et al., 2018), how does a bicultural or multicultural background inform opportunity identification, innovation, or resource acquisition strategies?

An historical approach could be adopted, expanding on how "patterns of crop cultivation appear linked to psychological differences" and the origins of innovation-oriented and cooperation-oriented cultures (Henrich, 2014: 594), linking these to the development and evolution of industries, decisions about who is a trustworthy transaction partner, or present day trends in venture team formation.

Scholars may revisit Henrich and colleagues' work spanning "visual perception, fairness, cooperation, spatial reasoning, categorization and inferential induction, moral reasoning, reasoning styles, self-concepts and related motivations" (2010:61) with an alertness to how variation on these constructs might influence the organizational phenomena they have been studying. These represent but a few examples of how an integrative Package 4 approach might be employed to bring together conceptual and empirical studies of cross-cultural variation to expand the scope of management theorizing.

Toward the Integration of Knowledge Generated through All Packaged Approaches

It is interesting to note that Packages 1 and 2 share a quantitative methodological orientation, Packages 2 and 3 share the goal of multiple specific psychologies, and Packages 3 and 4 share similar conceptualizations of the relationship between culture and psychology. In other words, while they represent distinct perspectives, these four packages are not incommensurable[25]. Scholars adhering to each of these "packages" argue compellingly for the importance of the tradition that they work to advance, yet I have found none who argue that their view should be the sole or dominant view; rather, the literature contains numerous calls for continued work in all approaches as well as increasing integration and cross-pollination (cf. Greenfield, 2000; Van de Vijver & Poortinga, 2002; Jahoda, 2012). Greenfield, who summarized a number of these approaches for the community of psychology scholars, emphasized that their differences "melt away when one has a deep theoretical framework that can encompass findings from all of them, … that can encompass both universals and cultural differences – a universal theory of cultural differentiation" (2000: 229).

Such a deep theoretical framework has been proposed by Shweder and colleagues (1998, 2006). Captured in the slogan "one mind, many mentalities", his framework recognizes an underlying "*universal deep structure of the human mind"* (Hwang, 2012:11) representing the full potential of cognition and basic

[25] It is useful to note that most discussions of various approaches studying culture in relation to psychology identify three traditions or approaches (cf. Eckensberger, 2015; Greenfield, 2000; Jahoda, 2012). I have found historical accounts of the origins and evolution of each tradition, written from various perspectives, very helpful in making sense of the alternative end goals of each tradition and how their favored methods were established. However, the evolution, cross-pollination, and new streams of thought in multiple traditions has led to some convolution, and the boundaries between the commonly identified three traditions are no longer crystal clear (if they ever were). I thus chose to present these three fields as entailing four packaged approaches: these cross-cultural psychology (Package 1), indigenous psychology (Packages 2 and 3), and cultural psychology (Packages 3 and 4). My hope is that the additional differentiation will help organization scholars identify the most appropriate approach for addressing a particular research question.

psychological functions (Shweder et al., 1998). On top of this is the operationalization of *specific mentalities*—comprising orientations such as individualism or collectivism, for example—representing the set of cognates actually employed by a given people group, subject to evolution in social and cultural environments (Hwang, 2012). To make the proposition more concrete by drawing a parallel to a concept we are all familiar with: The universal deep structure can be thought of as *hardware*, while specific mentalities are *software.* Humankind shares a deep, biologically rooted hardware for mental processing and cognition. Culture provides various systems of meaning that can be programmed in, acquired through social processes of acculturation. Shweder and colleagues write (2006: 719):

> The main wager of cultural psychology is that relatively few components of the human mental equipment are so inherently constrained, hardwired, or fundamental that their developmental pathway is fixed in advance and cannot be transformed or altered through cultural participation.

This shift toward "one mind, many mentalities" has (even) earned the buy-in of indigenous psychologists such as Hwang, who are able to identify with a "universal psychology or global psychology" whose aim "is to construct a series of formal theories which can reflect *both* the universal deep structure of the human mind and the specific mentalities of people in a given culture" (2012:11; emphasis added). While psychologists involved in the study of culture reconcile and elaborate on the philosophical foundations required for this new ontology, management scholars can turn their attention to investigating how the specific mentalities represented in various contexts influence the formation, operation, growth and evolution of organizations.

In the final section of this study, I offer a practical example of navigating among the various approaches presented here while designing, conducting, and positioning a study of cultural and psychological phenomena in the context of new venture creation.

Positioning your Cultural work as a Management Researcher: An example

This study was born out of my own frustration, as a management researcher, in wanting to draw from a coherent body of work on culture and psychology to inform my work on culture and founder identity. As I dug deeper, I found behind every definition of culture and every theory a package of philosophical and theoretical assumptions that did not always fit my own—and did not always fit the psychological studies in which they had been used priorly.

It became even further complicated when, in addition to navigating the many conceptualizations of culture, I found that my psychological phenomenon of interest—identity—had an equally varied history whose literature was scattered across multiple social sciences. Three prominent theories of identity—identity theory, role identity theory, and social identity theory—originate in psychology, sociology and social psychology, respectively, and are each built on different conceptualizations of the relationship between individuals and society, therefore positioning each to be more compatible with certain conceptualizations of culture than others. It is not an exaggeration to say that I spent years of my PhD sifting through these literatures to sort and select the concepts and constructs of culture and identity that would be most informative and appropriate for my grounded qualitative work with entrepreneurs, and also compatible with each other.

I illustrate the process of navigating approaches to culture and psychology by expanding on the experience of my coauthor and myself while designing and conducting a study in response to the broad question: How does sociocultural context influence founder identity? (see Chapter 2 of this thesis). Before undertaking the present study of various approaches to culture and psychology, I identified four aims for my empirical work in Chapter 2 that represent a desire to conduct organizational science that is both useful for the good of the collective, and honoring to the individual informants whose stories we rely on as raw materials for our scientific product. I discuss these aims in an excerpt from my research journal:

> An important first consideration maintains that the philosophical approach—that is, the research paradigm's assumptions about reality—should support both *macro- and micro-perspectives*; indeed, the focus of cultural analyses on individual identity often entail the interaction between phenomena at each of these levels. Culture itself can be conceptualized at various levels; consider the frequently induced "national culture" constructs (Hofstede; Schwartz)[26], and the increasingly popular construct of "organizational culture" at a meso-level (Ravasi & Schultz, 2006). To somewhat of a lesser degree, psychological phenomena have been conceptualized at multiple levels, going beyond the study of individual identity and individual cognition, for example, to investigate collective social identities or collective cognition in groups, organizations (cf. Weick & Roberts, 1993; Ashforth & Mael, 1989) and again, nations (Chen & Hwang, 2016).
>
> A second consideration is that our analyses aim to be valid *beyond a local context*. In other words, we aim not only for *internal* generalizability—i.e. "generalizing to those not directly observed who are members of the particular social system under study" (Eby, Hurst & Butts, 2009: 239)—but also some degree of *external* generalizability—that is to say, "generalizing to other social systems not directly under study; Maxwell, 1992)" (Eby, Hurst & Butts, 2009: 239). The aim of producing knowledge of context-dependent phenomena that is at least somewhat generalizable (and being clear about what aspects are generalizable), is critical to facilitating a unified discussion. Without this aim, studies of culture and identity have the tendency to fragment into innumerable branches, each level distinguishing more particularities of its scope than the one before it.
>
> Third, holding both interpretive and pragmatic values as a researcher, I want my findings to be '*true*' to the perspectives of the study participants in their cultural context, while also being *useful* to

[26] I might add that the empirical evidence for nation-level conceptualizations of culture is wavering. But this is a different conversation.

researchers seeking to apply models (e.g. in management and cross-cultural psychology) not only within, but also across cultural contexts. Thus, the second and third considerations are counterparts, representing a balance to be struck. They are also not exclusively my struggle; cross-cultural psychologist John W. Berry (1969) laments, "how can we focus on the individual without ignoring the universal, and how can we examine the universal without losing sight of the individual?" (p. 123). A solely interpretive approach leads to models too idiosyncratic to be useful across cultural contexts. An interpretive ethic, however, can be infused into a pragmatic approach, rendering results as comparable as possible while still true to informants' views of themselves and their world.

The fourth consideration concerns researchers themselves in the practice of creating scientific knowledge. Having considered my "positionality" as a researcher (Timmermans & Tavory, 2012:172) with regard to the study—namely, *as an outsider in the cultural context of my research* participants—a final consideration suggests I seek a philosophical approach that will allow for an outsider-researcher to develop intersubjective findings regarding phenomena most often construed as symbolic interactionist-constructivist. There are benefits to being an "insider" of the cultural context where one is doing research—for example, the intimate familiarity such as one has with one's mother tongue. There are also benefits to coming into a research context as an "outsider"—including the absence of a reputation and any relational "baggage", often fewer *a priori* assumptions, a fresh perspective on the setting, and a more systematic approach to learning the setting, the same way in which one must learn the grammatical rules of a language if they have not been acquired via osmosis during one's childhood. Berry writes, "Unless one subscribes to total subjectivity in science (e.g., 'You have to be one to understand one'), there is always the possibility that an outsider can eventually 'discover native principles' and 'grasp the native's point of view' (to use Malinowski's [1922] formulation). If this position is accepted, then a researcher is in a position to do emic work" (1989: 726). Not all research orientations support the validity of an outsider-researcher's findings; in order to integrate the cross-cultural organizational research that is being conducted globally by cultural insiders and outsiders alike, it is important that we adhere to one that does.

These four aims—to conduct *multi-level* research generating *both emic and etic* knowledge with an *interpretive ethic*, as a *cultural outsider*—led me on a non-linear search through the literature discussed throughout this study, and several iterations of data collection and analysis, before settling on an approach built on Package 3 and Package 4. The original design of the study would generate *emic* knowledge of founders' self-concepts in the Taiwanese cultural context in particular (and as a Chinese society, more generally), tied to specific firm outcomes—i.e. Package 3. During the fieldwork and data analysis, it became clear that our informants did not perceive one, single, unified sociocultural context, but rather each founder individually described up to three distinct social structures. While the cultural *content* embodying each of the three social structures was unique to Taiwan, the structures themselves had been previously identified and accepted by a large number of social scientists. My coauthor and I could have chosen to assign this mixture of various cultural elements and structures the label "Taiwanese context" – thus choosing to study it from the perspective of one single context and continuing with a primary aim to generate specific, local, *emic* knowledge – but we chose instead to take hold of the opportunity to explore and compare the ventures of founders who perceived each of three different social structures in order to advance *etic* knowledge of founding processes. This meant we had one foot well-grounded in Package 3, and another foot moving into Package 4.

In the sense that either approach could have resulted in valid knowledge, neither choice would have been more "correct" than the other; however, against the backdrop of our research goals, the combined approach we chose was more useful in advancing our research interests. Packages 3 and 4 share a close conceptualization of the relationship between culture and psychology, allowing the opportunity to employ both, side by side, in our study. We retained the cultural content of each social structure in our study context—e.g., what it means to live in a Traditional Taiwanese context, including being raised in a strong parenting style that determines or heavily influences a child's future career path (a Package 3 goal)—in addition to identifying patterns of identity-society interaction that fit into a larger framework applicable to all three contexts (a Package 4 goal). In this way, we worked toward converging the specific (*emic*) and general (*etic*) knowledge generated in our study of the way perceived sociocultural context influences Taiwanese founders' identities and venture creation decisions.

Conclusion

In response to significant interest in considering cultural and psychological phenomena in organization studies, and the relatively high entry barriers related to familiarizing oneself with the relevant literature scattered across multiple domains—spanning anthropology, psychology, cultural psychology, cross-cultural psychology, indigenous psychology, social psychology, cross-cultural psychology, etc., the present study summarizes four "packaged" approaches that management scholars can adopt in their studies of organizations *within* and *across* cultural contexts.

These packages, differentiated by their positions on the nature of culture (its definition, locus) and the comparability of cultures, carry important philosophical assumptions about social reality. Accordingly, each package entails a specific conceptualization of the relationship between culture and psychology, a particular starting point for developing research questions and appropriate methods of inquiry. Each has its merits, and limitations, with respect to the type of knowledge generated. Trade-offs entail prioritizing generalizability (Package 1), internal validity (Package 2), deep local knowledge (Package 3), or an overarching integrated process view.

Management scholars are increasingly addressing non-WEIRD contexts. The *Academy of Management Journal* published a special issue on emergent concepts and theories from the global East (2018, *vol.* 58[2]), and *Organization Studies* published a special issue focusing on deep cultural and contextual knowledge of the day-to-day lives of organizations and their members (2017, *vol.* 38[6]).

Scholars have fruitfully employed all four of the packaged approaches presented here, and several examples have been provided of innovative perspectives on cultural factors emerging in studies of organization founders, leaders, and members. Nonetheless, myriad opportunities remain to extend organization theory through increased contextualization (Baker & Welter, 2020), moving toward culture-inclusive models that describe not only the experiences of organization members in Western, Educated, Industrialized, Rich, Democratic societies, but also the other 88% of the global population (Henrich et al., 2010).

My hope is that the present study will not only lower the initial barriers to envisioning an organization study that accounts for culture, but that it also inspires management scholars toward a rigorous understanding of the origins of psychological theories they seek to apply and extend in organizational contexts, and a conscientious interest in how their informants may differ from a theory's underlying assumptions. What is at stake? Nothing less than the comprehensiveness of our collective understanding of the mechanisms by which individuals (co-)create financial and social value.

Chapter 4

Sustaining Latent Hybridity After Awakening to an Implicit Mission: The Case of Grand Challenge Venture Solar Impulse Foundation

ENRICO BERGAMINI * [27], SHIRAH FOY * [28], & MARC GRUBER

Abstract

Organizations may pursue multiple goals without all of the goals being explicit. Such is the case of latent hybrids—those characterized by an implicit, informal goal, identity or logic alongside explicit ones. We investigate how an organization sustains latent hybridity in an in-depth study of the Solar Impulse Foundation, whose sustainable mission is accelerated by its celebrity founder. We identify trigger events that awaken organization members to an implicit mission, affecting their perception of the organization's mission, and invoking the organic construction of informal guardrails to preserve each side of the hybridity. Our model of awakened and sustained latent hybridity emphasizes the role of dual mission synergies in teams' use of rigid or relaxed guardrails. Our results advance important conversations on hybrid organizing and entrepreneurship in response to grand societal challenges.

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* These authors contributed equally.

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[28] Authorship Notes: The entirety of the fieldwork and data collection was conducted by E. Bergamini. The author of this thesis provided direction throughout the data analysis process, meeting regularly with E. Bergamini to discuss and refine coding schemes. The coding itself was led primarily by E. Bergamini, with S. Foy acting as a second coder as needed. At key milestones, the two first authors met with M. Gruber to discuss iterations of the analysis; his questioning, insights and suggestions took the theorizing to an important new level. Iterations of the data structure and theoretical model were led by S. Foy, with valuable empirical critiques from E. Bergamini and theoretical critiques from M. Gruber. Approximately 80% of the final manuscript was written by S. Foy, with invaluable contributions from the other authors.

The Solar Impulse Foundation (SIF) was created in 2004 to develop an entirely solar-powered plane and complete the first ever round-the-world flight in such a machine; it was a bold mission envisioned by Swiss pioneer Bertrand Piccard, set on demonstrating the possibilities of next-generation sustainability. By the time the Solar Impulse plane touched down in Abu Dhabi in 2016, completing the final leg of its world-record-setting journey, the state of the environment and the global grand challenges for humanity had gained widespread public awareness—illustrated, for instance, by the adoption of the 17 Sustainable Development Goals by all of the United Nations Member States (UNDP, 2020). However, no single global authority had taken on the documentation and curation of concrete clean technology solutions to move communities and nations toward those goals, leaving a number of existing solutions unapprehended. Bertrand Piccard decided to take on this grand challenge and the SIF, leveraging the media attention earned with their exclusively solar powered world tour, announced its establishment of "a world council for clean technologies" (Carrington, 2016) to bring one thousand solutions "that can protect the environment in a profitable way" to high-level decision makers (SIF, 2017). Since then, their Efficient Solution Label has been awarded to 419 sustainable technologies, and the SIF has earned global recognition for clean technology advocacy (BBC 2019, Fehrenbacher, 2020).

We gained unique access to conduct research at SIF in 2018 and began an in-depth inductive study with a broad goal of understanding how the organization's recent initiatives had so quickly earned such legitimacy as to have gained an audience among top European decision-makers, including invitations for keynote speeches at the Parliament of the European Union, the 2016 and 2017 United Nations Conference on Climate Change, and official visits with French President Emmanuel Macron (Lebleu, 2019; Gayet, 2019). Through participant observation within SIF, we became sensitized to the symbiotic relationship between the organization's sustainable mission and the founder's personal brand. The SIF is an example of an organization created by an established actor in response to global grand challenges. Due to the systemic nature of problems that characterise grand challenges, the aim for scalable high impact solutions, and the high resource requirements in order to do so (Ferraro, Etzion and Gehman, 2015; George et al., 2016), actors who are elite (Stinchcombe, 1965), legitimate (Aldrich & Fiol, 1994; Navis & Glynn, 2011), prominent—i.e. central or prestigious (Knoke & Burt, 1983), or have a personal brand (Staskeviciute-Butiene et al., 2014) are uniquely positioned to draw attention and attract resources, especially when their organizations would not otherwise appeal to conventional investors seeking financial return (Molecke and Pinske 2017; Zahra et al., 2009). However, it has also been suggested that such prominent actors risk becoming a "heropreneur… who overemphasizes their role as founder, overshadowing teams, collective impact, and building upon the ideas of others" (Papi-Thorton, 2016: 3). In other words, instrumentalizing a founders' legitimacy in service of an organization's social mission is recognized as both highly beneficial and potentially detrimental.

During our fieldwork at SIF, we watched the maintenance of the founder's personal brand surface as an end-goal in its own right, eliciting mixed responses across teams in the organization who perceived the emergence of this implicit mission as either *reinforcing*—or *diverging* from—their explicit sustainable mission. Scholars have drawn on the concept of hybridity to explain organizations that pursue multiple missions (Battilana & Dorado, 2010; Doherty et al., 2014; Ebrahim et al., 2014). Whereas most prior work on hybridity has assumed that the dual identities, logics, or goals are—if not agreed upon—at least recognized by members of the organization, we know little about how hybridity plays out in organizations characterized by *latent hybridity*, in which at least one element of the hybridity is only implicit (Seibel, 2015).

We refined the focus of our study to understand how an implicit mission—namely, maintaining the founder's personal brand, which has been functionally reinforcing the explicit (sustainable) mission—is brought into the foreground, and how the organization responds. *How does an organization sustain latent hybridity when it awakens to an implicit mission?*

Our most important contributions are to the literature on hybrid organizing and entrepreneurship, as well as to emerging work on how organizations can address grand societal challenges. First, we refine the notion of latent hybridity and, responding to suggestions that latent elements lay dormant and may be awakened (Pratt and Foreman, 2000; Pratt and Rafaeli, 1997), we show various ways in which an implicit goal surfaces through an organization's daily operations. Our model of organizational response to an awakened implicit mission—emphasizing organizational members' perceptions of the mission, the role of trigger events, dual mission synergies, and the emergence of informal guardrails—reveals how organizations sustain latent hybridity. Second, by having gained rare access to a "celebrity founder" and to the organization he was in the process of establishing, we contribute to an important conversation in the entrepreneurship literature about the instrumentalization of individual founders—e.g., their prominence, their legitimacy, their identities—in service of their organizations (Navis & Glynn, 2011). Our findings not only show how the prominence of such founders can offer a "fast-track" towards overcoming the liabilities of newness in emerging organizations, but also reveal how maintaining their status carries its own demands that may create substantial challenges for the functioning of their organizations. We illustrate both the virtuous cycle of a founders' personal brand and a sustainable mission mutually reinforcing each other, as well as how internal perceptions of the mission can lead to a breakdown of this reinforcing mechanism inside the organization. Third, by combining our novel insights on latent hybridity and the role of prominent founders in the context of sustainable entrepreneurship, we are also able to advance research on how organizations may play a pivotal role in helping to address grand societal challenges (Ferraro, Etzion and Gehman, 2015; George et al., 2016; Markman et al., 2019; O'Neil and Ucbasaran, 2016). Particularly in light of the large scale and scope of such challenges as well as their oftentimes pressing nature, our study provides interesting insights on how such individuals can leverage their status in order to address the significant resource and legitimacy demands associated with grand societal challenges, and provide solutions within an accelerated time frame.

LATENCY IN ORGANIZATIONS

Latent Hybridity

Latent hybridity, originally coined in reference to informal institutional arrangements of sectors and governance mechanisms, was first defined in contrast with the "manifest hybridity" embodied in formal public-private partnerships (Seibel, 2015). Conceptual predecessors include Merton's (1968) discussion of organizations' manifest and latent functions, and Perrow's analysis of the "many unofficial goals" pursued in organizations (1961: 855). While unofficial goals may be introduced at many levels of an organization (e.g., overall mission, strategies, sub-groups and their missions, tactics, individual member goals, etc.), we are primarily interested in end goals at the level of the organization's reason to exist, which is consistent with the level of focus in the hybrid organizing literature more broadly. The literature on hybrid organizing has examined hybridity in three main elements of an organization: its goals or reason to exist, its identities (i.e., central, enduring and distinct values and beliefs [Ashforth et al., 2008]), and the institutional logics guiding its behavior (Battilana & Lee, 2014). We incorporate this triad and build on prior conceptualizations of latency to define latent hybridity as the state of comprising one or more goals, identities, or logics that are informal, implicit and unofficial, in addition to those that are formal, explicit, and official. While the focus of this study is on organizational goals, our review of prior work reflects the scattered nature of scholarly attention to latency in organizations; thus, in addition to a focus on goals, we include work concerning logics and identities that may be relevant to latent hybridity.

The literature on hybrid organizing has largely focused on organizations whose dual goals, identities, or logics are explicit, intentional, and—though perhaps disputed or refuted—equally understood across the organization (cf. Albert and Whetten, 1985). The concept of latent hybridity that we have refined, above, challenges all three of these assumptions. First, by nature of being implicit, latent hybridity is not explicit. In other words, a latent goal is not formalized in an organization's mission statement nor otherwise institutionalized as a formal goal, purpose, or raison d'être of the organization. Rather, it operates in the background, possibly—but not necessarily—inferred (detected) by organization members. Second, our definition of latent hybridity encompasses implicit element that were both introduced intentionally or emerged organically. While, organizational goals are frequently viewed as being the result of a deliberate choice process, an implicit goal, identity, or logic, may also emerge without a singular intention (cf. de Souza & Klein, 1995; Gilpin & Miller, 2013; Nelson et al., 2016). Third, our definition of latent hybridity makes no stipulations about organization members' awareness of an implicit goal existing alongside the explicit goal(s) until it is awakened. In this vein, Pratt and Foreman (2000) suggest that "latent identities may lay dormant until an organizational issue or other event triggers their awakening" (2000:20). We use the term dormant latent hybridity when all or part of the organization is not aware of the implicit element, and the term awakened latent hybridity when the implicit element is realized. When organizational members are unaware of an implicit goal, identity, or logic, their awakening to the implicit element would not automatically transform the organization's latent hybridity into manifest hybridity—that is to say, until the hybridity became truly manifest by being made formal, explicit and official, it would remain latent. It remains to be seen whether, and how, unconscious latent hybridity, conscious latent hybridity, and manifest hybridity may function differently in organizations.

Drawing on some of the earliest studies of organizational hybridity (Michels, 1911; Selznick, 1949)—before it had been labeled as such—Seibel suggested that, "What we learn from [these examples] is that actual hybridity may originate from informal rather than formal arrangements and that there is good sense in acknowledging the existence of latent hybridities that do not appear on the radar screen when just looking for manifest, formal, and official combinations…" (2015:698). Integrating empirical studies of latent hybridity into the hybrid organizing literature is an opportunity to expand our knowledge of how the phenomenon of hybridity unfolds in organizations, by studying those which do not obviously appear to be hybrids. It is also an opportunity to investigate how practitioner assumptions about latent hybridity play out in reality, because, while latent hybridity has drawn little attention in academic literature, practitioners have promoted its usefulness. For instance, the popular Social Entrepreneurship for Dummies handbook contains an entire section on "Unofficial Goals: Stuff you secretly hope to also achieve", describing them as "unstated, secret, or hidden objectives that are nevertheless important for some of the people personally involved with your enterprise" (Durieux & Stebbins, 2010:120).

While we have few empirical studies of latent hybridity from which to draw, we can imagine how a number of phenomena associated with hybrid organizing may manifest differently under the circumstances of latency. For example, many of the mechanisms empirically shown to help managers address and manage hybridity—such as paradoxical frames (Smith & Besharov, 2019), and integration of the hybridity by every member of the organization, as is the case in holographic hybrids (Albert & Whetten, 1985)—seem to require a conscious awareness of both elements of the hybridity, something that latent hybridity does not guarantee. Similarly, organizations that cope with hybridity by embracing tensions created by dual elements and "the dynamic equilibria they create" (Mongelli et al., 2019:302), thereby leveraging the strengths of each element of hybridity as well as their interconnections (Battilana et al., 2015, 2017; Smith et al 2012; Ashforth & Reingen 2014), might have trouble doing so if an element of the hybridity is only latent. In order to embrace each element of a duality, their tensions and interconnections, an individual must be, first, conscious of the duality, and at least accepting or approving of its existence—if not intentional about maintaining it. Another way organizations cope with manifest hybridity entails establishing guardrails—"formal structures, leadership expertise, and external stakeholder relationships" (Smith & Besharov, 2019: 27)—to represent the interests of each side of the hybrid in day to day operations. It is unclear how such formal guardrails could be established or function to support an implicit mission in organizations characterized by latent hybridity.

While latency might complicate or render certain coping strategies unlikely, an implicit goal, identity, or logic might also enable new coping strategies or otherwise benefit a hybrid organization. For instance, it remains to be seen how an implicit goal might contribute to mission spillover effects (MSEs)—that is, the benefits that help a venture pursue one mission as a result of pursuing the other (Siebold, Günzel-Jensen and Müller, 2019).

Theorizing about latent hybridity is in a nascent state, leaving open key questions regarding the origins of latent hybridity, its potential for (counter)productivity, strategies organizations employ to cope, the perception of latent hybridity by internal and external stakeholders, and the effectiveness of managerial efforts—e.g., "by means of mere communication" (Seibel, 2015:709)—to resolve frictions that may arise from maintaining an implicit goal alongside the organization's explicit goal. We know little about the potential benefits and challenges to an organization when one element of its hybridity is latent.

Latent Hybridity and Prominent Founders

One way in which latent hybridity can be introduced to an organization is via prominent founders, who—beyond their goal to create an organization with an explicit goal—may have an implicit goal to preserve and aliment their prominence. Prior research has documented that prominent founders can bring legitimacy, visibility and prestige to an emerging organization (Navis & Glynn, 2011), thereby helping the organization to attract key resources (Staskeviciute-Butiene et al., 2014) and to overcome its liability of newness (Stinchcombe, 1965; Brüderl & Schüssler, 1990). Put differently, prominent founders may "fast-track" their organization on its route to become an established, impactful player.

In addition to the legitimacy that prominent founders initially bring to an organization, organizations have long been a source of continued visibility and prestige for their founders and leaders29. The degree to which founder/leader prominence is embedded as an organizational goal, and the degree to which this is made explicit—thus creating a latent or manifest hybridity—may be linked to the perceived legitimacy of coupling the two goals, identities or logics that comprise the hybridity. The more acceptable the goal of maintaining founder prominence might be to internal and external audiences of the organization, the more likely the goal may be made explicit to each audience, respectively.

We undertake an exploratory study to investigate the nature of latent hybridity in a sustainable venture, focusing on how the organization repeatedly awakens to the implicit goal of maintaining the founder's prominence, and how cognitive and behavioral responses unfold throughout the organization as trigger events awaken the implicit goal over time.

[29] We have seen founder/leader prominence coupled with a public institutional logic in examples from heads of state that range from more to less explicit (cf. Kim Il Sung and the state of North Korea, Vladimir Putin and the state of Russia, Queen Elizabeth II of England). We have also seen founder/leader prominence coupled with a business logic, e.g. Donald J. Trump and The Trump Organization, and actresses Jessica Simpson and Mary-Kate and Ashley with their respective fashion companies. Founder/leader prominence may be coupled with a social or sustainable mission, as seen with the Bill and Melinda Gates Foundation.

METHODS

We investigate our research questions in an in-depth inductive, qualitative study (Gioia, Corley & Hamilton, 2013) of the Solar Impulse Foundation (SIF), an organization established in 2004 by famed pioneer Bertrand Piccard, with the original goal to promote clean technologies and energy efficiency, and following a pivot in 2016, in pursuit of bringing a portfolio of 1000 feasible and profitable clean technology solutions to policy decision makers worldwide. When our data collection ended in March 2020, the SIF Efficient Solution Label had been awarded to 419 clean technology solutions. The foundation's revenues come from corporate sponsorships and speaking engagements of its prominent founder. While revenues from the founder's engagements directly support the foundation, the founder does not receive any monetary compensation from the foundation.

The SIF is based in Switzerland and run out of one office location, which is spatially divided according to three functional groups; a long hallway physically separates the top management team (TMT)—internally referred to as "Headquarters"—on one side of the building, from the Labeling team on the other. A third group, offering transversal administrative support (such as communications, diplomatic affairs, IT) to both teams, is scattered throughout the building. On the Headquarters side, the environment is comfortable, almost cosy, and familial; much of the team are long-time friends of the founder and his family. The offices of the labeling team, on the other hand, are sleek, modern and filled with young recruits, many of whom are interns. The organization, as a whole, experiences high turnover. Among the 40 members of the organization employed when we began our fieldwork in February 2019, only 22 of those 40 remained in February 2020. Meanwhile, an additional 23 members were hired in that same time period.

Grand Challenge Context

The desired impact of the SIF—to see policy makers and decision makers implement clean technology standards and solutions in countries and trade regions—puts the foundation in the category of organizing in response to grand societal challenges. Grand challenges, such as—but not limited to—those summarized in the United's Nations 17 Sustainable Development Goals (UNDP, 2020), are systemic in nature and require solutions that are high impact in both scale and scope (Ferraro, Etzion and Gehman, 2015; George et al., 2016). Effective solutions require the engagement of multiple stakeholders, potentially including those with considerable institutional power, and tend to necesitate cross-sectoral partnerships (Bode, Rogan & Singh, 2019; Doh, Tashman, and Benischke, 2019). Actors who are elite (Stinchcombe, 1965), legitimate (Aldrich & Fiol, 1994; Navis & Glynn, 2011), prominent—i.e. central or prestigious (Knoke & Burt, 1983), or have a personal brand (Staskeviciute-Butiene et al., 2014) are uniquely positioned to draw attention and attract resources, especially when their organizations would not otherwise appeal to conventional investors seeking financial return (Molecke and Pinske 2017; Zahra et al., 2009). Given the pressing nature of many grand challenges, prominent founders may be key agents for addressing such challenges due to their ability to accelerate partnerships and key resources underlying scalable solutions.

Data Collection

The model of organizational awakening and response to latent hybridity we develop is based on the following types of evidence (summarized in Table 4.1):

Semi-structured interviews. A first round of in-person interviews was conducted with every member of the organization (40 people including the founder), between February and June 2019. All except two agreed to these interviews being recorded; for one of those two, notes were taken during the interview, and for the other detailed notes were typed up within one hour following the interview. Interviews lasted 30–120 minutes, with questions ranging from operational aspects of the individual's daily practice (e.g. their role in the organization) to more cognitive aspects (e.g. their motivations, goals, expectations, key elements of their worldview and significant life-experiences). While the initial interview protocol was mostly standardized across informants, it evolved for subsequent interviews in order to adjust on the fly as themes emerged in the data (Corley & Gioia, 2004). A second round of interviews was conducted in March 2020, following publication of a new version of the mission on the website and an internal document that emphasized—explicitly, for the first time—the founder's prominence and role in the mission. This second round of interviews served as member checks with regard to our categories and process model, and also allowed us to extend our understanding of responses to this explicitness.

Participant Observation. Positioned by the management as an external consultant providing technical expertise brought in-house, as well as a researcher, one of the authors joined SIF's Labeling team for three and a half days per week, for five months in the first half of 2019. The remaining day and a half each week was spent in the university office with the research team, in order to step back, debrief, and discuss emerging findings (Cappellaro et al., 2020). More than 500 hours of ethnographic fieldwork were conducted, during which detailed notes were taken regarding employee interactions.

Management Meetings. In addition to daily interactions in the offices, periodical meetings between the founder and leaders of each team provided insight into each team's perspectives, core interests, concerns, and the way these were expressed in the inter-team dialogue. One of the authors attended 9 consecutive management meetings, in which he was primarily an observer, with the exception of one time in which he was called on by name to contribute.

Events. The SIF engages in two types of events. They (generally, the founder) are invited to speak about their work—usually to high profile audiences including politicians and corporates, but also to startups—at public events such as the U.N. annual meetings on climate change, deep technology conference Hello Tomorrow, and the impact-focused ChangeNOW Summit. The SIF also organizes a number of events to engage with their own network of experts who volunteer to evaluate solutions proposed for the Efficient Solution Label. Attending both public and private events provided opportunities to collect data on how SIF engaged with stakeholders and partners, including those who provide financing and those who provide expertise. We also collected data on how stakeholders perceived the SIF, how they conceptualized the SIF's mission, and their own personal (or corporate) interests in supporting and contributing to the work of the SIF.

Secondary Data. We gained full access to the organization's internal server database. This allowed us to analyze the way different teams framed the organization's overall goal(s) and positioned their work within that frame. We also consulted the SIF website and other public information (e.g. books written by the founder, magazine articles, public interviews, YouTube videos); these materials provided general background information about the SIF and its founder.

4.1. Summary of Data Collected

	Wave 1 2019	Wave 2 2020	Total
Interviews			**50**
Headquarters (HQ)	8	3	**11**
Solutions/Label (L)	18	3	**21**
Support (S)	14	4	**18**
Participant Observation			
Daily operations (in hours)	580	56	**636 hours**
Organization-wide meetings	8	1	**9**
Team meetings	50	2	**52**
Informal gatherings	9	3	**12**
Private events	8	4	**12**
Public events	2	1	**3**
Archival Documents			
Internal documents			**120**
Internal communications			**604**
Website and online content by SIF			**60**
Media mentions: video and radio			**73**

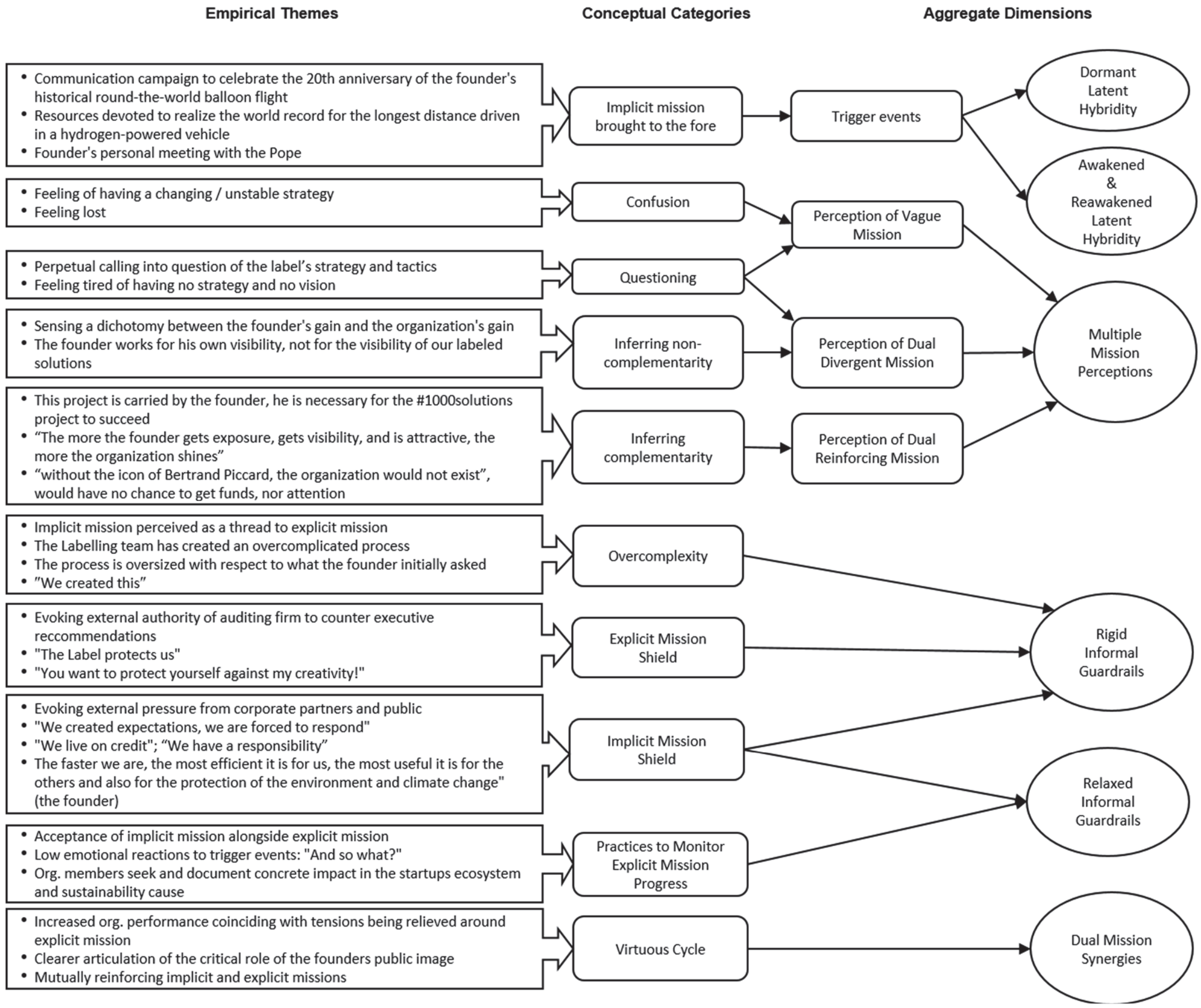
Data Analysis

We employed techniques for analyzing inductive, qualitative data with particular attention to organization members' interpretations of events and the evolution of meanings (Corley & Gioia, 2012; Miles, Huberman & Saldaña, 2014). Early on in the fieldwork, it became clear that individuals within the organization had different conceptualizations of the SIF's mission. An initial set of interviews revealed significant differences in employees' perceptions of the organization's mission, as well as the curious phenomenon of a number of employees, who identified strongly with the published social mission of the organization, voicing questions and concerns about the meaningfulness of their day to day work activities and their uncertainty about whether the organization's activities would and could accomplish the stated mission. To better understand both the origins and the outcomes of this inconsistency of mission accounts given by employees, we interviewed every member of the organization, including the founder. We iterated our interview questions to further explore mission perceptions and were able to tie each perception category to interpretations of a number of events that brought the founder's prominence—namely the organizational bandwidth allocated to maintaining his prominence—to the fore. Having established maintenance of the founder's prominence as an implicit mission embedded in the organization's strategies and operations, we asked, *How does the organization sustain latent hybridity when it awakens to this implicit mission?*

We worked iteratively and with a variety of data displays, following multiple sensemaking strategies for illuminating individual-level, team-level, and process dynamics (Langley, 1999). We linked insights from employees' individual interviews to spontaneous collective behavior in meetings. This allowed us to identify mechanisms that were constructed or evoked by organizational groups to protect the explicit mission from the perceived threat of the implicit mission, and, in turn, to protect the implicit mission from the operational overcomplexity created to protect the explicit mission. A year after beginning fieldwork, we observed a change in behavior: no longer did team members feel the need to protect the explicit mission so vigorously, but rather showed more tolerance toward periodic allocation of organizational bandwidth to activities that supported primarily the implicit mission. This change in behavior spurred the elaboration of a timeline tracking important events in the life of the organization, as well as a second wave of interviews with members of each team. As a result, we were able to identify productive synergies between the dual missions as a tempering factor and distinguish between early-stage and later-stage responses to the surfacing of an implicit mission.

Our data structure in Figure 4.2 shows how we built on empirical themes to develop conceptual categories and derive aggregate dimensions for our theoretical model.

4.2. Data Structure



FINDINGS

The SIF Grand Challenge Mission Accelerated by a Prominent Founder

Stepping out of the *Solar Impulse,* the plane in which he had just successfully completed the first ever round-the-world flight[30] powered entirely by solar energy, acclaimed third-generation Swiss explorer and best-selling author Dr. Bertrand Piccard approached the press gathered on the Abu Dhabi tarmac and announced that he was creating "a world council for clean technologies" (Carrington, 2016) to bring decision makers one thousand solutions "that can protect the environment in a profitable way" (SIF, 2020). Four months later, he was presenting his vision for the Solar Impulse Foundation's World Alliance for Efficient Solutions at COP22, the United Nations annual meeting on climate change[31]: In addition to shedding light on existing solutions for fighting climate

[30] Co-piloted with André Borschberg

[31] The twenty-second Conference of the Parties in the Framework Convention on Climate Change took place in Morocco from 7-18 November, 2016.

change, SIF seeks to federate all the actors—e.g., companies, startups, investors, associations—in the field of clean technologies, facilitating the delivery of cleantech solutions that help policy makers reach environmental targets.

Much of the early attention to SIF was garnered through Bertrand Piccard's vast social network and public audience spanning many domains of business, scientific, political, and social life. This is a network that he both received and cultivated—as grandson to Auguste Piccard, inventor of the pressurized cabin and stratospheric balloon, and first human to view the curvature of the earth from the stratosphere (in 1931); son of Jacques Piccard, the first human to dive to the deepest point of the ocean floor; and having set multiple world records himself—for instance, accomplishing the first non-stop balloon flight around the world in 1999. His March 2015-July 2016 round-the-world flight on a solar-powered plane generated a remarkable and sustained broadcast coverage. Over the whole time frame, the *Solar Impulse* team organized 600+ one-on-one interviews, 28,590 English speaking broadcast clips (TV & radio) worldwide, 241 hours of news coverage over 53 countries, 69,865 online news stories worldwide in 11 languages, 130 billion media impressions. On their social media, they benefited from 24 million page views on solarimpulse.com, 8.3 million unique users on solarimpulse.com, 28 million live views across all media platforms, 1.18 billion impressions of *#futureisclean* on Twitter and 4 million engaged users on Facebook. The *Solar Impulse* project benefited from sustained broadcast coverage across international global media outlets such as CNN, BBC, Reuters, CNBC, Al-Jazeera or CCTV, that realized regular reporting thus ensuring global visibility to the project (AD1).

At the beginning of one biannual meeting that the SIF holds with representatives of its industrial partners, Bertrand *emphasized* that the mission of the SIF is the promotion of clean technologies and to raise awareness around grand societal challenges. However, during the same session, the managers of SIF's corporate industrial partners, having observed that the founder's personal relationship with CEOs plays a key role in the agreement to allocate funds to the SIF, *reminded* Bertrand to maintain frequent contact with their CEOs. An SIF team member recalled this message from the industrial partners in an interview directly following the meeting:

> Today we see that ... that really struck me, each of the partners, even [redacted], they said, "You must keep in touch with our CEO, Bertrand, you have to keep in touch. Because for us, even if we say that [SIF] is great, it's thanks to you, thanks to your personal image that we are here". [HQ7]

Others confirmed,

> All [the partners] appreciate the persona of Bertrand Piccard [L14]
>
> The more Bertrand gets exposure, gets visibility, and becomes attractive, the more that shines on the Foundation [L14]
>
> Without him we can't do anything, so he works for the Foundation. He raises money for the foundation, he raises… all this is for the Foundation. [L11]

The media and public attention drawn by their celebrity founder clearly served to accelerate the sustainable mission of the Solar Impulse Foundation. However, in practice, this was not the only mission that organization members perceived. Individuals across the organization explained how their impression of the SIF mission evolved over the course of their employment and a series of revelatory events.

Trigger Events Bring an Implicit Mission into the Foreground

Throughout our fieldwork, we observed a series of *trigger events* bring the founder's prominence into the foreground in ways that revealed the maintenance of his prominent public-facing image as an implicit mission in the organization. Each of these trigger events revealed to organization members that, *in practice*, a significant amount of organizational attention and resources were, at recurring intervals, diverted to communications and activities that primarily supported the founder's personal achievements and prominence. These events triggered a range of reactions, which are foreshadowed in the descriptions of each event below, and explored in depth throughout the rest of the findings.

The Balloon Campaign. In March 1999, Bertrand Piccard completed the first ever round-the-world flight in a hot air balloon, doing so in twenty days and establishing a new world record. This costly monumental flight was sponsored by Swiss watchmaker Breitling, whose name was printed prominently on the silver foil balloon, and who later became a sponsoring partner of the Solar Impulse Foundation. In line with Bertrand's contractual obligation to promote visibility of the sponsored flight, and leveraging the opportunity to draw attention to Bertrand and his current work at the head of the Solar Impulse Foundation, the SIF ran a large media campaign leading up to the 20th anniversary of this historical flight. While an objectively interesting opportunity for the SIF—and one of the only means by which the SIF could give back to its only non-tech sponsor—this campaign brought the implicit mission of maintaining the Bertrand Piccard brand into the foreground at a time (March 2019) when the Foundation had curated only 115 of the 1000 solutions it had promised by December 2018.

> I don't know why, they decided—or [the project leader] decided—to do a whole big thing, a paid communication campaign, we spent a considerable amount of money to promote [online] posts, videos, we called on people all across the world to make posts. It was, in terms of workload it was even more than that… [the project leader] finished at 9pm every night to finish this or that thing, make quizzes, make things. Myself, I was in the mode of, "Actually we don't really care". [We] could have written a three-paragraph LinkedIn post to say "it was such an amazing time" and period. We could have had just about the same visibility and that's enough, we move onto something else... We can't even say whether it worked or didn't work. There was no objective. What's the point? We don't even know. [S9]

The Labeling team, who was not only under pressure to deliver quickly, but also facing an increasingly lengthy process that had attained—at that time—a median duration of 239 days from submission to labelling decision, perceived the balloon campaign as disconnected from the sustainable mission:

> Actually, we had a huge argument with [team member] from Outreach Perspectives: that we want to work on resources to go to help us, in order to recruit solutions. But they did a huge campaign on the balloon anyway. [L6]

On the other hand, organization members with greater exposure to the foundation's external relations understood the important link between the founder and the foundation:

> It's part of that "love for the brand" part: people like to keep in touch with the Foundation also because they are inspired by Bertrand. Therefore, the fact to keep nurturing this admiration for Bertrand leads to admiration for the Foundation. So [the communication campaign on the anniversary of the balloon flight] also made sense in terms of communication around the Foundation. [S11]

Pressure to Simplify Processes. A second trigger illuminating the implicit mission of the founder's prominence stems from a series of discussions between the founder and the Labeling team that took place throughout the first half of 2019. The founder—driven by what was, in his mind, a clear and simple goal to not only curate but also make good on his public promise to *deliver* 1000 sustainable tech solutions to decision-makers—had made repeated requests that the Labeling team simplify procedures in order to more rapidly screen and award the label to startups with promising solutions. His requests continued to be accompanied by ambitious deadlines. For example, at the beginning of March 2019, Bertrand signed a partnership with a European government that would grant funding to the SIF in exchange for a promise to label a substantial number of solutions (around 300) from that country by the end of the month. At that time, 300 new solutions represented three times the volume of their full solutions portfolio, which had been painstakingly curated over a span of more than six months. Bertrand's request for an exponential acceleration of the labeling process triggered considerable questioning, even crisis, within the Labeling team.

The Labeling team, who took their task of developing the Efficient Solution Label very seriously, were fully invested in developing this label to be the most appropriate tool for promoting clean technologies. In their view, the founder's tendency to push for streamlining and simplifications would impede the quality control of the label. The Labeling team was ignorant of the funding stipulation from the government partner, but became cognizant of the importance placed on maintaining the founder's public image as driving, or largely contributing to, the pressure to deliver solutions quickly. A series of internal meetings debating the time vs. quality trade-offs of the labeling process erupted in frustration that was expressed by one of the team members:

> Let's stop calling it 'Efficient Solution Label', instead we're going to call it the 'Bertrand Piccard Label'! [L18]

Multiple Perceptions of the SIF Mission

Based on organization members' capacity to infer the complementarity of the founder's continued prominence and the foundation's sustainable mission, the organizational bandwidth allocated to promoting the founder's image triggered either the perception of a *dual reinforcing mission*, or, confusion and an initially *vague* understanding of the mission, which, after a period of questioning, resulted in the perception of *dual diverging missions.* Each individual progressed at their own pace down a path to inferring reinforcing or diverging latent hybridity, based on when they were hired and the trigger events they encountered during their tenure at the SIF. Though we interviewed team members separately and found that their perceptions were formed through their unique interpretations and expressions, we also observed strong patterns in the mission perceptions developed by individuals in a given team, when compared with other teams. Tables 4.3 and 4.4 are organized to emphasize the patterns in mission perception associated with employment tenure and team affiliation. Additional quotes reflecting variation in mission perceptions are provided in the Appendix.

Inference of a Dual Reinforcing Mission. Every member of the Headquarters team, as well as those who had been employed for more than a year—a relatively long duration—in the Support team, acknowledged the reinforcing nature of the explicit sustainable mission accompanied by an implicit mission to promote Bertrand's public image. For these experienced members of the SIF, and mostly senior professionals, the importance of Bertrand's embodiment of the foundation's message and his ability to personally deliver this message to an audience was an essential asset of the organization.

> People need to understand that the Solar Impulse Foundation without the figure—without the icon Bertrand Piccard—would not exist. What [the foundation] is doing would not be possible, it would not have any change of being financed, or of being heard, if it did not have the figure of Bertrand Piccard. [HQ1]
>
> For someone [like me] who works in communication, in terms of storytelling, having a hero in the narration is perfect for being able to tell a story and to motivate people. [S11]
>
> My motivation is in terms of Bertrand it's helping to inform perspectives and use him. I mean, not from a selfish sense, but ultimately he is a mouthpiece. He's a megaphone. ...because we are managing somebody's personality and ensuring that that person remains relevant, a lot of our work focuses on trying to find yes, strategically placing him on certain topics, on certain subjects, he needs to talk about. [S3]

In addition to understanding the critical way Bertrand's celebrity reinforced the SIF's sustainable mission, these employees also recognized how the foundation's mission—in particular, delivering on a grand challenge mission—reinforced his public image. For certain members of the organization, it was clear that undertaking the grand challenge of curating 1000 feasible and profitable clean technology solutions, and thereby contributing to human progress, was of great importance in Bertrand's quest to continue his personal and family legacy.

> Bertrand needs this new story. He needs the new success in order to continue to live his personal narrative of someone who takes on and achieves challenges *regularly* [emphasis in original]. That's very personal. [HQ4]

Vague Understandings lead down a path toward perceiving a Dual Diverging Mission. Following the launch of the World Alliance for Efficient Solutions in 2017, the Solar Impulse Foundation created an Efficient Solution Label in 2018 as a means of engaging with inventors and startups, inviting them to apply for the label, and screening candidates in the process of building up the portfolio of 1000 efficient solutions. The members of the Labeling team were mostly fresh graduates, many of whom were hired as interns or external consultants. At the time the study was conducted, half of the members of the SIF had been working for the organization for less than one year. Interviews with each individual revealed that new recruits in the labeling team had only a vague understanding of the organization's mission, and the more longstanding members of the team held a perception of the SIF as having two diverging missions. In the words of one employee:

> I always saw Bertrand's vision as one line, and the vision of the Foundation as another line, and they have never been parallel. [L18]

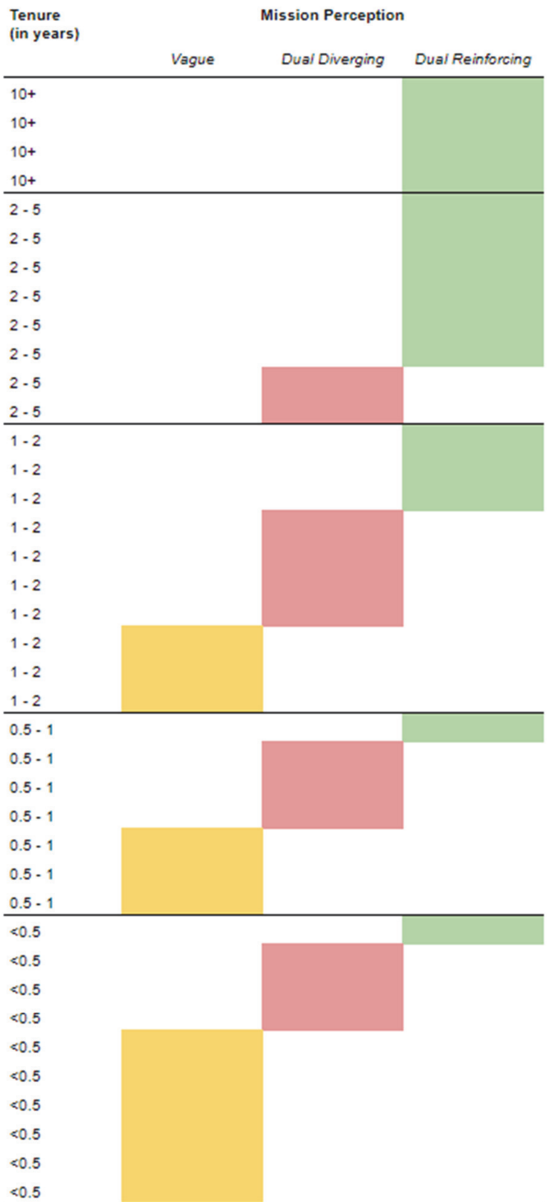
Much of the confusion leading to vague understandings of the SIF mission was associated with mistaking means and ends—for example, seeing the label as an end in itself as opposed to a means for collecting and delivering a portfolio of solutions to decision makers. A significant amount of confusion resulted from observations of organizational bandwidth allocated to promoting the legacy of the founder's past achievements, without any direct link to curating a portfolio of efficient solutions. Beyond the fact that these employees were not exposed to industrial partners who emphasized the importance of Bertrand Piccard in their decisions to fund the organization, these floundering employees did not receive explicit internal communications about the ways in which the founder's brand accelerates the Foundation's work. As a result, with their experience at the SIF accumulating over time, individuals with an initially vague understanding of the mission gradually moved toward a perception of two diverging missions.

> In the beginning I worked for the Foundation, this is how they sold it to me. It's only very recently that I realized that I actually work for him… Clearly the Foundation is there to give Bertrand visibility. [S7]

> The Foundation serves Bertrand. [L14]

This perception of an increasingly diverging dual mission was repeatedly exacerbated by a number of trigger events in which maintaining the founder's prominence surfaced as a key driver of organizational decisions.

4.3. Employment Tenure and Mission Perception



Individuals' tenure ranged from 0.1 to 15.00 years. To protect employees' anonymity, we indicate their tenure relative to meaningful thresholds.

4.4. Team Affiliation and Mission Perception

Table 4.3 visualizes how employees who have been longest employed at the foundation perceive the implicit and explicit missions as mutually reinforcing. In contrast, those who are newer to the organization either have only a vague understanding of the mission or see the implicit mission as diverging from the explicit sustainable mission. Table 4.4 visualizes how this perception of the mission is tied to team affiliation. The Headquarters team, which handles all of Bertrand's speaking events as well as oversees all activities of the foundation, has a unanimous perception of the dual reinforcing mission. In the Labeling team, whose exclusive responsibility is to gather 1000 solutions, over half the team perceives the implicit mission as a separate agenda that diverges from the foundation's core work. The Support team, which is composed of multiple sub-

teams who serve a number of functions for both Headquarters and the Labeling team, have varying perceptions of mission complementarity.

Early-Stage Responses: Constructing Rigid Informal Guardrails

Trigger events, such as the balloon campaign and ongoing pressure to simplify the labeling process, not only brought the implicit mission into the foreground and challenged employees' understanding of the organization's overall goal, they also prompted spontaneous collective behavior across teams. Events that made the implicit mission appear to threaten the explicit mission provoked the Labeling team to concentrate organizational resources on the labeling process in a way that created a rigid guardrail, eventually eliciting a response from Headquarters in the form of their own rigid guardrail. Rather than being formally established, as guardrails have been previously conceptualized (Smith & Besharov, 2019), the informal guardrails we observe at SIF develop organically. We show the construction of these rigid informal guardrails (summarized in Table 4.5) by teams protecting the interests of each mission in the back-and-forth around the simplification of the labeling process.

Overcomplexity as a Rigid Guardrail. The Labeling team's efforts to protect against drifting from the sustainable mission manifested in the creation of an increasingly complex labeling process. It was a process that allowed them to alleviate some of the perpetual calling into question of the label's strategy and tactics through the creation of lengthy and specific protocols.

> "We created" and that is what I find absolutely magnificent in this situation. We created this, you see. It's us that have created all of it. You see, no one told us like, "Ok, you have to do it this way, deal with it". [S9]

While development of the labeling protocol served the purpose of anchoring and uniting employees who were struggling with the diversity of organizational activities and goals, it resulted in a process that entailed 239 days from receiving an application to issuing a decision—a median duration which peaked at 303 days, that is, around 10 months. In March 2019—i.e. throughout the 20th anniversary balloon campaign—the team was able to process applications at the rate of issuing 11 labeling decisions per month, a procedure which had yielded a total of 115 solutions. This was a far cry from the 1000 solutions that had been promised by December 2018.

Even the label's biggest proponents admitted that this overcomplexity was becoming an obstacle.

> We have a very detailed procedure and I think that we remain rather… We are very rigid in our procedures. [L13]

> We have an evaluation mechanism that I find very good, but which is, for me, much too complex for what we want to do. And which uses an enormous amount of resources in its mechanics, if you like, and so it takes a lot of resources to implement all that. [L14]

> It's an ultra ultra over complicated process. [L11]

Implicit Mission Shield. With the laborious labeling process radically challenging a plausible date for portfolio completion, Headquarters realized the threat to Bertrand's public image—should he fail to deliver on a highly publicized goal. They pushed for streamlining the Labeling team's overly complex procedures in order to more quickly fulfill Bertrand's promise and preserve his image in front of decision makers and the public. Headquarters shielded themselves from criticism by evoking a sense of external pressure, which was, to some extent perhaps exaggerated, and to some extent supported. Bertrand himself could be heard saying,

> We have a responsibility [vis à vis the institutions] … We created expectations, we are obligated to fulfill them… We live on credit… We are recognized for what we are going to do. This means that it is extremely important to do it, and to do it quickly… The faster we are, the most efficient it is for us, the most useful it is for the others and also for the protection of the environment and climate change. [Founder]

In a meeting that included corporate partners, one representative, speaking about the label, said, "You don't want to create a monster" [PM1]. Certain members of Headquarters understood the distress such a push could inflict on the Labeling team; nevertheless, taking action was important if the foundation was to maintain the credibility conferred by their celebrity founder.

> They are young, they need rules, they need rules to reassure themselves… When I speak about it [changing and simplifying the labelling procedure] internally, it scares them. [HQ1]

Explicit Mission Shield. The Labeling team responded with their own shield, evoking, in turn, the external authority of the auditing firm that had certified their intricate labeling process. When it was relayed that "Bertrand wants it that way" [L14], a teammate responded, "EY [the auditing firm] will never accept" [L11].

Supporters of both sides of the latent hybridity repeatedly used the shields as informal, rigid guardrails as the organization sought to achieve a balance of implementing a rigorous solution screening process while delivering on public promises.

Later-Stage Trigger Events

Following a period of several months during which maintenance of the founder's brand faded into the background, a number of trigger events brought the implicit mission back into the foreground in later stages, reawakening members to the latent hybridity.

Meeting the Pope & EU Leader. Having sustained and grown his visibility as an influencer in the field of sustainability, Bertrand Piccard received multiple high-level invitations to meet with institutional leaders in February 2020. In a matter of ten days, he was received by the leader of Interinstitutional Relations and Foresight (IRF) at the European Commission, then Pope Francis at the Vatican. While these were anticipated by the SIF's Diplomatic Affairs team as critical opportunities to cultivate relationships with powerful figures and gain publicity that would put the SIF in the good graces of important stakeholders, the energy put into these meetings again raised questions internally about the scope of the organization's mission.

> I don't want to be negative, but what is going to come out of that? I mean, yes—we published an article, maybe people will say, "Oh, so cool, he met the Pope". Okay great. I mean, are we going to install some [cleantech] solutions in the Vatican now? Is the Pope going to bring us solutions? Is the Pope going to— I don't know. I have doubts about that. In contrast, as you see, Bertrand gets really excited about that, meeting public figures like that. … The question is, to what extent are each of the podiums he is put on going to advance the foundation's cause? For example… with [the IRF leader], I say well great, that's three years that we've been talking about [him]. Each time we see him at each COP, what happens? Well, not much, you see. I mean it's a bit harsh but—I don't see—oh well. [L10]

> All this organization serves Bertrand, it doesn't serve the companies nor the ecological transition purely. It serves his public image. Otherwise, he would go to the European Commission with a team of negotiators, and would say "Okay guys, we've detected [that] for 10 solutions that there is an issue in the regulations, namely this, this, this and this. [Mr. EU Leader], what can you do? Can you make things change? Can you change the law?", No! He goes there, shakes hands, and just says "Eh, I'm about to get my 1000 solutions, it's great, we're going to look for new solutions that are good for the environment." And [Mr. EU Leader] answers "Sure! Bertrand, you're right! Goodbye." [L14]

Achieving a New World Record. Committed to helping the transition to responsible mobility, car manufacturer Hyundai asked Bertrand Piccard to lead the world record for the longest distance driven on a single tank in a hydrogen-powered car. In the spotlight of social media, Bertrand Piccard achieved this record in November 2019, driving 778 km across France (Hyundai, 2019). While many ministers and CEOs accompanied him throughout the record-setting journey and joined in the message he was delivering for promoting a clean transportation industry, this event received ambivalent reactions and even came as a surprise for some members of the SIF. In fact, those who held a perception of dual diverging missions regarded this event as part of Bertrand Piccard's personal activities, thus not legitimate to being part of the organization's activity—a perception exacerbated by the fact that Hyundai holds a partnership with Bertrand Piccard himself, rather than with the SIF.

> It became a topic of discussion because everybody wondered 'But why should we do this? It's not our job, that's Bertrand's stuff. … I wanted to consider and understand what the logic was. [L14]

However, despite the misunderstanding and tensions this initially created at the SIF, the event was designed to provide visibility to both the founder and the organization and succeeded in doing so.

> [The Hyundai event] has created a huge visibility around the record. And that, that benefits both Bertrand and the Foundation at the same time. [L14]

An Enduring Multiplicity of Mission Perceptions

As illustrated in these reactions from members of the Labeling team, more than a year after observing their awakening to the implicit mission, individuals across the organization still hold different understandings of the organization's mission(s) and their perception of a diverging or reinforcing mechanism at play. At least two factors have contributed to maintaining this multiplicity of perceptions. First, even in the latest period, no internal communication has been done on the importance of the founder's personal brand, so those with only vague understandings of the mission are confused by trigger events and follow the same path to perceiving diverging aims, while those who have held a perception of dual diverging missions are not informed otherwise. Second, the high turnover rate—on average, 1.5 new people (including interns and consultants) per month have been hired at the SIF—has contributed to an ever-present number of new hires coming in with vague understandings of the mission.

In the eyes of those holding an understanding of the sustainable mission and founders' brand as reinforcing, these events contribute to both the missions of the organization and are ultimately necessary for progress on the explicit mission.

> People here need to understand that the Solar Impulse Foundation, without the person, without the icon Bertrand Piccard, would not exist. What [the Foundation] does, wouldn't be possible, it wouldn't have any chance to raise funds, nor to be listened to, if the person Bertrand Piccard wasn't there. You can wonder whether meeting with the Pope, or the 20th anniversary of the round-the-world flight—"do these have anything to do with our job?" It has to do with communication, which is necessary to acquire the conditions for the Foundation to work. [HQ1]

4.5. Informal Guardrails that emerged organically in the context of latent hybridity

RIGID INFORMAL GUARDRAILS

Overcomplexity Originally intended to provide credibility to the SIF Label, the labeling process became soon an over complicated process, made of lengthy and specific protocols and involving several actors (i.e. up to five external evaluators, an external auditing firm, and regular meetings with at least one representative per each team of the SIF, and the founder himself)

developed by The Labeling team, whose members perceived a vague or diverging mission, and aimed to protect the sustainable mission and to alleviate some of the perpetual calling into question of the label's strategy and tactics

evidence

We have a very detailed procedure and I think that we remain rather… we are very rigid in our procedures. [L13]	It's an ultra ultra over complicated process [L11]	Here everything becomes immediately over complicated [L9]
"We created" and that is what I find absolutely magnificent in this situation. We created this, you see. It's us that have created all of it. You see, no one told us like, "Ok, you have to do it this way, deal with it". [S9]	We have an evaluation mechanism that I find very good, but which is, for me, much too complex for what we want to do. And which uses an enormous amount of resources in its mechanics, if you like, and so it takes a lot of resources to implement all that. [L14]	You don't want to create a monster [PM1]

Implicit Shield Given the personal engagement vis à vis the partners, the public institutions and the governments, the founder is aware of the threat to his public image—should he fail to deliver on a highly publicized goal. He pushes for streamlining the Labeling team's overly complex procedures in order to more quickly fulfill his promise and preserve his image in front of decision makers and the public. For gaining legitimacy in his demands to simplify and accelerate the process, he regularly evokes a sense of external pressure, which is, to some extent perhaps exaggerated, and to some extent supported.

developed by The founder, who, in order to accelerate the labelling process and deliver the 1000 solutions quickly, put pressure on the Labeling team by invoking the sense that external stakeholders (institutions, governments, and sponsoring partners) have strong expectations of the SIF

evidence

We have a responsibility [vis à vis the institutions] [Founder]	We created expectations, we are obligated to fulfill them [Founder]	We live on credit [Founder]
We are recognized for what we are going to do. This means that it is extremely important to do it, and to do it quickly [Founder]	The faster we are, the most efficient it is for us, the most useful it is for the others and also for the protection of the environment and climate change [Founder]	

Explicit Shield When the SIF was initially developing their new Label, they asked EY (one of the Big Four accounting firms) to certificate their labeling process. Originally intended to provide credibility to their Label, the external authority of the auditing firm was instrumentalized as a means of shut down ideas or requests that were perceived as incurring a drift from the sustainable mission.

developed by	The Labeling team, whose members perceived a vague or diverging mission, and aimed to protect the sustainable mission and to alleviate some of the perpetual calling into question of the label's strategy and tactics
evidence	[The Label] protects us [L11] I need to protect myself! [L1] You want to protect yourself against my creativity! [Founder] Bertrand wants it that way [L14] — EY [the auditing firm] will never accept [L11]

RELAXED INFORMAL GUARDRAILS

Practices to Monitor Explicit Mission Progress	In a later stage characterized by higher performance of the organization with regard to the explicit mission, members seek to understand and document the foundation's concrete impact in the startup ecosystem and sustainability sector.
developed by	The Labeling team, whose members perceive a vague or diverging mission, yet whose behavior appears to be more tolerant and tempered towards the fulfilment of the implicit mission.
evidence	I see that, in connecting startups, etc. with the big [corporate] groups, we are succeeding in creating some impact, and that at the end of the day, I'm happy if I've seen that my small connection with the startup [Clean Vaccine] and then I connect them with [Big Pharma] and at the end of the day the guy says, "Dude, that's incredible, I would have never been able to get a connection like that with a big industrial"—and then I say to myself, ok maybe my work is going to be useful for something. [L14] The [Labeling] team is now fundamentally THE team of the Foundation, because we hold events that were successful, because it brings results, because we're the only ones who stay on track with our KPIs. And we moved, the Experts were the problem, before, and now are the strong suit ... This rebalancing has demonstrated that after all a good work, and an accurate way of working, can bring results ... And this led [Bertrand] to trust a bit more and leave things be ... So he found himself with something that works better [L1] I'd say that in the end you found a middle ground agreement, which is having a system that is quite heavy anyway, but leaner, and that gives us a polished credibility [S9] [Our arguments] are based on numbers. And we're starting to have a database that is big enough to say that the reality is based on [our analyses] [L8]

Later-Stage Responses: Relaxed Informal Guardrails

Despite the fact that individuals' cognitive reactions to trigger events did not change over time, we observed an evolution in operational responses. In a later stage characterized by higher performance of the organization with regard to the explicit mission, we observe more tolerant and tempered behavior on the part of those with the perception of a diverging dual mission.

Practices to Monitor Explicit Mission Progress. One of the core means of keeping the sustainable mission at the front of the organizational agenda was by rigorously tracking and regularly presenting data on the organization's progress toward achieving the goal of curating 1000 clean technology solutions. Rather than invoke a rigid guardrail meant to amass resources for the sole pursuit of the explicit mission, members seek to understand and document the foundation's concrete impact in the startup ecosystem and sustainability sector.

> I see that, in connecting startups, etc. with the big [corporate] groups, we are succeeding in creating some impact, and that at the end of the day, I'm happy if I've seen that my small connection with the startup [Clean Vaccine] and then I connect them with [Big Pharma] and at the end of the day the guy says, "Dude, that's incredible, I would have never been able to get a connection like that with a big industrial"—and then I say to myself, ok maybe my work is going to be useful for something. [L14]

Implicit Mission Shield. Headquarters maintained the same narrative as before, with the founder continuing to emphasize that the foundation lived "on credit" and needed to quickly deliver the 1000 solutions it--or rather, he--had promised. However, with the Labeling team realizing that it was also in their own interest to prune the overly complex protocol they had established, the application process was accelerating and Headquarters did not need to use the implicit mission shield as aggressively as before.

The Role of Dual Mission Synergies

How did the organization recover from an internal breakdown of its implicit and explicit mission? Internal communication around the implicit mission of maintaining the founder's prominence did not change—that is to say, there still is none. Nevertheless, tensions within the organization decreased. We find that the organization's improved performance—generated by the synergies of the mutually reinforcing dual mission—played an important role in balancing operational focus.

Table 4.6 compares the foundation's performance, the organizational dynamics, and individual reflections on the state of the organization in 2019 (the first full year of operations following the establishment of the Efficient Solutions Label) and one year later, in 2020. Comparing the two periods, the key metric of total solutions labelled grew by more than 600% and demonstrated significant progress toward the goal of 1000 solutions. The number of partners also grew, with key industrial partners renewing their multi-year support commitments, and being joined by three important European national or regional level institutional partners. Prior sentiments of chaos and confusion in internal meetings were replaced with a sense of stability and confidence in the team's ability to advance the organization's goals. These collective expressions of new found harmony were reiterated in individuals' personal reflections—as articulated in interview waves 1 and 2—on where the foundation is headed, and their role in that movement.

This significant change in performance had important implications for the atmosphere in which team dynamics played out. On one hand, since the Labeling team began to perceive the SIF as successfully pursuing its sustainable mission, they tended to accept the implicit mission alongside the explicit mission. In this new context, bandwidth allocated to the implicit mission does not seem to threaten the explicit mission, and so the Labelling team does not invoke rigid guardrails anymore, as these are not deemed necessary. A member of Headquarters confirms: "Today I wouldn't speak any more, if you like, about overcomplexity. It was a phase" [HQ1]. Rather, the dual mission synergies produced an environment in which the Labeling team began to employ less rigid means of bringing the central focus of organizational attention and resources back to the explicit sustainable mission when trigger events emphasized the founder's prominence.

4.6. Organizational Outcomes Created by Synergies of Dual Mission

Measure	March 2019	March 2020
Total labelled solutions	60	369
Average solutions per month processed (labelled or rejected)	8	50
Median duration of labelling process (from application to decision)	250 days	100 days
Industrial partners funding the SIF	9	15 (+ 3 signing)
Institutional partners	0	3
Organizational dynamics in meetings	The current situation at the Foundation is comparable to "a chicken coop where the chickens have their heads cut off" [L9]	"[During the last meeting] Bertrand was—he's super happy, he's super satisfied, as you could hear" [S13]
	"I'm lost" [L11]	"The team is fully operational, I am happy, and we can now move forward quickly with this wonderful team that you represent" [Founder]
Individual reflections	"I was in favor of questioning even the Label, along with other people, like [manager]. We said 'hey guys, we're making big mistakes...', because it was too slow" [L14]	"now I'm starting to say to myself, okay—maybe my work is going to count for something" [L14]
	We have a very detailed procedure and I think that we remain rather... we are very rigid in our procedures. [L13]	"The problems are resolved, people are organized" [HQ1]
	"Everything immediately becomes an overcomplicated process" [L9]	"Today I wouldn't speak any more, if you like, about overcomplexity. It was a phase" [HQ1]
	"When in November-December [2018] I was on the edge of leaving [the foundation]... I started to get tired of always, always calling the label into question, not having a strategy, not having a vision, I mean being incapable of saying "Here's what we're going to do in January 2019--while we are in January 2019". I found that a bit worrying... it's something that could eventually make me leave. [L18]	"In the beginning, everything was centered around Bertrand. But then, as we advance, more and more it's the Foundation, because the Foundation has developped a well-known technical expertise and so now the Foundation "exists". When we were seven people originally, the foundation didn't "exist", it didn't carry any value, only Bertrand "existed". Whereas now we're at a point where there is Bertrand and the Foundation." [HQ4]
		"We are now truly achieving a certain harmony, with respect to our work, with respect to the relationship with Bertrand. Bertrand has also come a long way." [HQ1]

With the overcomplexity tamed and somewhat streamlined, those who perceived the dual mission as a reinforcing mechanism no longer needed a shield to protect the implicit mission. The synergies created and organizational performance generated only served to fortify their perception of the critical role of their founder's public prominence.

Thus, while bandwidth allocated to events emphasizing the founders' prominence triggered a variety of mission perceptions, the organizational tension produced by each event—and the reactions provoked—improved as the organization's success relieved pressure around the sustainable mission.

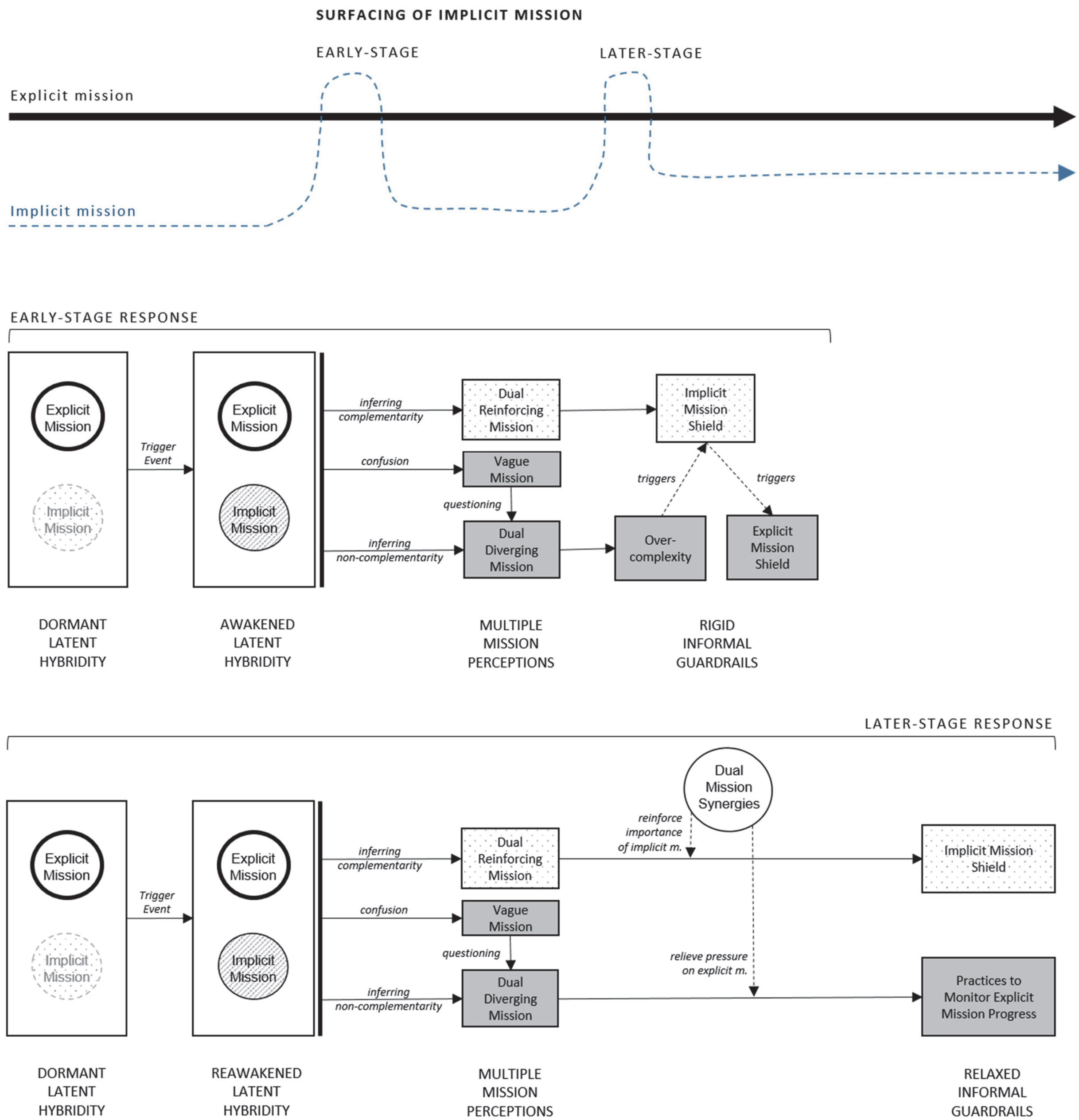
THEORETICAL MODEL: SUSTAINING LATENT HYBRIDITY

With few exceptions, studies on hybrid organizing have not differentiated elements of the hybridity that are explicit and formalized from those that are implicit and informal. These exceptions suggest that latent identities (Pratt & Foreman, 2000; Pratt & Rafaeli, 1997) and latent logics (Seibel, 2015) are at work in the background throughout the course of organizations' daily operations, both helping them (e.g. in realizing cross-sector partnerships) and possibly challenging them (e.g. when a latent identity emerges and gives rise to contestation). However, until now we have had little understanding of how latent elements of hybridity may emerge as visible to organization members, how individuals, groups, and the organization as a whole responds to this awakening, and how latent hybridity is sustained over time. Our model of organizational awakening and response to latent hybridity shows how implicit and explicit missions persist together in an organization over time. Integrating our findings with extant literature, we describe the model represented in Figure 4.7.

Beginning with a state of dormant latent hybridity, in which at least part of the organization (over half, in this case) is unaware of an implicit goal at play, we observe trigger events bring the implicit goal to the attention of organizational members (Pratt & Foreman, 2000) through the concentration of resources outside the scope of the organization's explicit mission (Battilana et al., 2015). Organization members either infer the complementarity of the implicit and explicit missions, or the awakened latent hybridity generates confusion and a vague sense of the mission as individuals ponder the "perceived discontinuity" between their organization's actions and the image they had of the organization (Grimes et al. 2019). Without further input surrounding the complementarity of the implicit mission, continued questioning—of the organization's aims and their individual role in fulfilling those—leads employees to a perception of two diverging missions. These findings are consistent with studies of employee sensemaking around their organization's purpose and identity.

Scholars have found that division within hybrid organizations, based on organizational members' preference or identification with one element of hybridity more than another, can ravage, paralyse, or disable the organization by creating contestation (Besharov, 2014; Pratt & Rafaeli, 1997), which has been seen to escalate into enduring conflict (Fiol, Pratt, and O'Connor, 2009; Battilana and Dorado, 2010). In order to avoid division, organizations can create spaces of negotiation where members can negotiate trade-offs between competing goals (Battilana et al., 2015), cope by either marginalizing one element of the hybridity or blending them using a number of strategies (Zahra et al., 2009; Olivier, 1991; Jay, 2013; Kraatz & Block, 2008; Pratt & Foreman, 2000), or establishing formal guardrails that act "as guardians of each mission" (Smith & Besharov, 2019: 8).

4.7. A Model of Organizational Awakening and Response to Latent Hybridity



The informal guardrails in our model fulfil the same function as the formal guardrails discovered in organizations whose hybridity is manifest—that is, to prevent mission drift (Ebrahim et al., 2014) "by setting boundaries on how far meanings and practices shift" (Smith & Besharov, 2019: 28)—however, rather than being put in place by managers, informal guardrails are organically constructed by groups who perceive the dual mission as either reinforcing or diverging. In other words, we observe a grassroots initiative to protect each side of the hybridity. We add to the types of guardrails that Smith and Besharov (2019) observe managers erecting "in the form of metrics, goals, and roles dedicated to each mission" (p.27) with our observation of *processes* and *external demands* leveraged as either offensive (e.g. evoking promises to stakeholders to press for process simplification) or defensive (e.g creating complex processes to ensure quality control) means of protecting what a group perceives as the legitimate mission(s).

Dual mission synergies (Pratt and Foreman, 2000; Siebold et al., 2019) play an important role in the ability of a latent hybrid organization to sustain its operations. Whereas Smith and Besharov's (2019) formal guardrails intensified over time as management learned to wield them effectively, the informal guardrails at the SIF became more relaxed as the organization grew more successful at pursuing both its implicit and explicit missions. We find that, whereas organizations whose elements of hybridity have some inherent conflict of interest must balance their naturally diverging focus, organizations—like the SIF—whose elements of hybridity are inherently reinforcing, can move toward a focus that converges on the mutual interest of its two missions. In practice, the synergies generated by the dual missions working together alleviated pressure around the explicit mission over time, creating an atmosphere in which team members did not sense the need to reject initiatives beyond the scope of the explicit mission so aggressively, resulting in a model that entails rigid informal guardrails in an organization's early stages, followed by more relaxed informal guardrails in later stages.

CONTRIBUTIONS

Hybridity is a key topic in the management and organizational literature, in no small part because many of the challenges that our society faces today require organizations to accomplish not only one but multiple fundamental goals or missions. It is thus not surprising that a quickly growing number of studies seek to improve our understanding of hybridity in both newly created and established organizations (Ashforth & Reingen, 2014; Battilana & Lee, 2014; Cappellaro et al., 2020; Doherty et al., 2014; Siebold et al., 2019). The present study sought to extend this important line of research by providing an in-depth examination of a new organization that is both challenged by and benefits from latent hybridity over the course of its creation and establishment. Our findings contribute several novel insights to the literature on hybrid organizing and entrepreneurship, as well as to emerging work on how organizations can address grand societal challenges.

Contributions to the literature on hybrid organizing

Our first main contribution is to the literature on hybrid organizing. As discussed, latent hybridity was initially invoked as a concept to emphasize the informal, implicit aspects of hybrid organizations—in contrast to the formal or explicit aspects that are evident in manifest hybridity (Seibel, 2015). To-date, however, we still know very little about the character, the potential benefits and the potential challenges to an organization when one element of its hybridity is latent. Against this backdrop of scant prior research, the present study describes and analyzes latent hybridity in an organization that has only one explicit mission—and which, from the outside, might appear to be a traditional foundation. This observation suggests the possibility that many more organizations, even though not officially of a "hybrid" kind, may benefit from the complementarities of hybridity, or in turn, suffer from the vulnerabilities of hybrid organizations, without an internal awareness of the source of these reinforcing—or diverging and dividing—forces that we document in our study. In other words, once one is sensitive to the possibility of latent hybridity, one will be more likely to diagnose and be able to productively act on it. It is important to recognize that when the two goals, identities, or logics are mutually reinforcing, one may not necessarily perceive them—but rather they would only emerge as distinct elements if and when they compete for limited organizational resources. Our results therefore not only reiterate but also advance what the hybrid organizing literature has called a "new perspective" on the potential for a mutually reinforcing nature of hybrid logics.

Along these lines, our findings suggest a number of theoretical mechanisms that are likely to come into play when an organization awakens to latent hybridity. In particular, responding to suggestions that latent elements lay dormant and may be awakened (Pratt and Foreman, 2000; Pratt and Rafaeli, 1997), our study not only shows various ways in which an implicit goal surfaces through an organization's daily operations, but also examines how the members of an organization will respond to and work with an awakened hybridity. The construction of a shield by one part of the organization to protect the explicit mission, and subsequent response by the other part of the organization to protect the implicit mission, demonstrate that even in the absence of *formal guardrails* put in place by management (Smith & Besharov, 2019), hybridity in an organization (be it latent or manifest) tends toward structures that protect both interests/goals/logics—even if they must arise via a type of grassroots movement.

Contributions to research on entrepreneurship and the "grand challenges" literature

Our findings also provide interesting insights for the entrepreneurship literature—which are, in no small part, driven by the fact that we benefited from rare access to a "celebrity founder" and to the organization he was in the process of establishing. Our findings can therefore contribute to an important conversation in the entrepreneurship literature about how individual founders can be instrumentalized in service of their organizations, such as via their prominence, their legitimacy, and their identities (Navis & Glynn, 2011). These intangible endowments enable these founders to overcome the liabilities of newness of their emerging organizations within a short time span, essentially converting their intangible assets into important tangible resources—such as funding, networks, human capital—as well as into intangible resources that are conferred to their emerging organization—such as its own reputation, visibility and brand recognition. While these important elements have been subject to prior examination (Hopkinson & Cronin, 2015), our study reveals that the maintenance of such founders' status carries its own demands that may create substantial challenges for the functioning of their organizations. As discussed in the previous section, we identify both the virtuous cycle of a founder's personal brand and a sustainable mission mutually reinforcing each other, as well as how internal perceptions of the mission can lead to a breakdown of this reinforcing mechanism inside the organization.

In addition, our results contribute to the literature on social and sustainable entrepreneurship (Miller, Grimes, McMullen & Vogus, 2012; Muñoz & Dimov, 2015) and the related emerging discussion on “grand societal challenges”, which has recently been identified as a potentially new paradigm in the management and organizational sciences (George et al., 2016; George, Merrill & Schillebeeckx, 2020; Markman et al., 2019). The Solar Impulse Foundation is merely one example of an organization created by a prominent figure in response to grand challenges. Due to the systemic nature of problems that characterise grand challenges, the aim for scalable, quick, high impact solutions, and the high resource requirements in order to do so, public figures with a personal brand are uniquely positioned to draw attention and attract resources (Staskeviciute-Butiene et al., 2014). For instance, the emotional and celebrity appeal of charismatic leaders such as Elon Musk, Muhammad Yunus, and Ashton Kutcher have been leveraged to attract, on behalf of their organizations, a critical mass of decision-makers, audience buy-in and willingness to change behavior. The term “heropreneur” has been suggested to describe such founders; its definition—despite the obvious potential of a celebrity founder to reinforce an organization’s social mission—notably stresses the potential downsides of the founder’s involvement, painting them as one “who overemphasizes their role as founder, overshadowing teams, collective impact, and building upon the ideas of others” (Papi-Thorton, 2016: 3). Our analysis unearths more nuanced insights by showing how a public figure’s brand and reputation can be a vital accelerating force for acquiring the resources and public attention needed to address a grand challenge, but also come with some liabilities that require the (proactive) attention of these important agents of change in the face of grand challenges.

Generalizability and limitations

This study presents an in-depth analysis of a single organization, the Solar Impulse Foundation, created by famed pioneer Bertrand Piccard. This organization pursues the goal of making the world a better place with its search for, and support of, one thousand solutions in clean technology. Given the specificities of this foundation, the question arises to what extent the findings offered in the present study are generalizable. We discuss this question from the angle of hybrid organizing as well as the perspective of entrepreneurship with a particular emphasis on grand challenges.

First, the phenomenon of latent hybridity is likely to be fairly wide-spread, given that a latent goal, identity or logic can have a wider variety of contents. For instance, we suspect that many family businesses have a latent hybrid identity, especially when there is an unspoken ambition of the family to preserve its family heritage over time. Likewise, one may think of organizations that have an official for-profit mission, yet seek to fulfil other unofficial goals at the same time.

Second, in terms of the entrepreneurial process and the goal to address a grand societal challenge, we suggest that the organization we investigated in this study is exemplary of cases where a resource-rich person or organizational entity decides to embark on a social or sustainable mission. For instance, Bill and

Melinda Gates have created the Bill and Melinda Gates Foundation in order to address a wider variety of problems and challenges faced by humanity. Ashton Kutcher has created Thorn, a foundation that helps defend children from sexual abuse. In these and many other cases, the emerging organization gets a head-start from the prominent and/or financially well-endowed founder, thereby overcoming its liabilities of newness in an accelerated fashion—which is of importance given the pressing nature of many of the problems that need to be addressed. We suspect that due to the setup of these organizations, they face, or have faced, similar benefits and challenges due to latent hybridity over the course of their establishment process.

Given the promising results of the present study, we encourage future research on latent hybridity to increase the scope of coverage to other organizations. Likewise, we encourage researchers to further examine the setup studied in the present research—a prominent founder, rich in intangible resources, giving his organization a head-start into addressing a grand societal challenge—as this is seemingly one of only a few possibilities that exist in order to accelerate the identification and deployment of solutions to address pressing social and sustainability questions.

Chapter 5

Conclusion

The three studies comprising this thesis have provided three different perspectives on entrepreneurship across sociocultural contexts, advancing knowledge of organizational phenomena in a number of ways. Before undertaking a broader discussion of contributions and future research directions, the specific outcomes of each study are revisited.

Study I developed a theory of identity-society (mis)alignment in entrepreneurship, postulating that important venture decisions are affected by the alignment or misalignment between—on one hand—the way entrepreneurs decide what experiences are important to their self-conceptualizations, and—on the other hand—the types of experiences and factors their sociocultural context suggests *should* determine the way they form a sense of self.

Study II presented four approaches that can be adopted for the study of culture and psychology within organizations. Fundamental differences between each approach were explored through discussions of their philosophical and methodological assumptions, and examples were provided with respect to the various types of knowledge about organizations and their members that can be generated by employing each approach.

Study III refined the notion of latent hybridity and developed a model of how latent hybridity is sustained throughout the recurrent surfacing of an implicit mission in organizational activities. Novel insights into latent hybridity were combined with the role of prominent founders in the context of sustainable "grand challenge" entrepreneurship.

Discussion

Together, these three studies contribute to broader conversations about the contextualization of management research. In particular, my work and the work of my coauthors, presented here, advances discussions about contextualization at three levels of analysis: the individual level, the organizational level, and the societal level.

Individual Level: Entrepreneurs and their Environment

On an individual level, this work advances understanding of entrepreneurs' *perceptions of themselves*, entrepreneurs' *perceptions of their environments*, as well as entrepreneurs' *instrumentalizations of entrepreneurship* as a means of interacting with the social environment to achieve personal goals. I expand on each.

Research on entrepreneurs and their environments has principally been interested in the means by which individual entrepreneurs (and increasingly, teams) identify business opportunities; the consensus being that opportunity discovery or creation entails a combination of important individual and environmental factors (Gruber et al., 2012; Grégoire & Shepherd, 2012; Ucbasaran et al., 2008). This body of work has primarily taken the perspective of investigating entrepreneurs' *perceptions of the environment*, assuming (and demonstrating how) these are determined by *objective* human capital inputs, such as education and prior industry experience. Only recently have scholars begun to recognize the importance of entrepreneurs' *subjective perceptions of themselves*—including their values, motivations and identities—with regard to the opportunities they identify and pursue (e.g., Fauchart & Gruber, 2011; Cardon et al., 2009; Cardon et al., 2012; Mathias et al., 2015; Mathias & Williams, 2014). Study I of this thesis extends the conversation by investigating the interaction of entrepreneurs' *subjective perceptions of themselves* in light of their *subjective perceptions of their environment*; the results illustrate how this identity–society interaction, which plays out in the minds of entrepreneurs as well as in social interactions, shapes not only the nature of the opportunity they identify—i.e. to design their lives, to design products, or to design society—but also the business model they build in pursuit of doing so.

Moreover, throughout the past decade, scholars have developed an interest in how entrepreneurs' perceptions of self are formed. The primary explanatory mechanism offered has been *imprinting* forces, such as formative experiences or important role models (Dickel et al., 2020; Marquis & Tilcsik, 2013; also Kish-Gephart & Campbell, 2015 on CEOs). We take the conversation to a more granular level, tying entrepreneurs' perceptions of specific social structures around them to the types of experiences and sources of social influence they deem worthy of being formative—i.e. their *identity structure.* In doing so, we provide a more in-depth explanation of the mechanism of entrepreneurial imprinting. The identity–society (mis)alignment theory we develop also explains the prototypical identity structures of entrepreneurs inhabiting particular social structures, thus suggesting the *types* of experiences and *sources* of influence that are most likely to be formative for entrepreneurs in a given sociocultural context.

Meanwhile, another stream of research has investigated entrepreneurs within various sociocultural environments, with an interest in cultural variation. Early studies, especially those comparing across cultures, have used a single scale to measure entrepreneurs' "agreement" with a list of cultural values (e.g., McGrath et al., 1992). While this measures individual attitudes and the homogeneity—or sense of shared values—among a given sample, it does not allow for analysis at a level of granularity that identifies (or compares) individual-level *and* context/culture-level values. McGrath and MacMillan

(1992) illustrate that these are indeed two different constructs, and that entrepreneurs hold different beliefs about themselves (as entrepreneurs) than they do about non-entrepreneurs (within their culture). In Study I we demonstrate that entrepreneurs within the same geographical region (i.e. within the same city) can hold a wide variation of perceptions about their sociocultural context, and that the particular *configuration* of beliefs about self and beliefs about the surrounding culture have important implications for venturing. We therefore contribute support for continued multi-level analyses of entrepreneurs' perceptions of individual-level as well as context-level factors; this multi-level perspective is relevant for *within-context* studies as well as studies *across contexts.*

Organizational Level: Organizational Forms and Context

While organizations are influenced by their context indirectly, *through* their founders—as discussed above, nascent ventures quickly become an entity in their own right and become engaged *directly* with their sociocultural environment. Certain contexts of venturing have been found to accommodate particular types of organizational arrangements.

For example, hybrid organizations have been identified as particularly suitable within the context of social entrepreneurship, which pairs the goals of economic value creation and social value creation (Skelcher & Smith, 2015; Ebrahim et al., 2014; Battilana & Lee, 2014). The work in this thesis adds further nuance to this link between organizational arrangement and context, illustrating how pairing particular goals can be especially beneficial in an "extreme" Grand Challenge context—one that calls for rapid, high impact, scalable, multi-actor solutions to intractable problems (George et al., 2016).

Furthermore, in addition to investigating the empirically novel pairing of a sustainable mission with a mission to maintain a celebrity founder's brand, Study III contributes one of the first in-depth empirical studies of *latent hybridity*. Originally proposed by Siebel (2015) as a form of hybridity entailing an implicit, informal logic alongside an organization's explicit logic, we refine the concept of latent hybridity, illustrating how it may challenge several of the unstated (but seemingly generally held) assumptions of the hybrid organizing literature.

This particular context of grand challenge venturing seems to have facilitated the observation of an organization awakening to latent hybridity: In this case, it was the maintenance of a celebrity founders' personal brand that emerged as an implicit goal alongside the organization's sustainable grand challenge mission. Because of the extreme resource requirements—both in terms of social capital, to acquire multiple high-level institutional partners (such as the United Nations and the European Commission) and in terms of financial capital, needed to scale solution search and vetting processes—a prominent founder who can hold an audience with heads of state and top corporate executives, not only gaining an audience with them but enlisting their support and financial sponsorship, is a particularly useful resource that merits the status of a (part of the) continued mission of the organization.

Our work begins a conversation around the instrumentalization of founders by their organizations as a means of engaging with the surrounding sociocultural context. While publicly prominent and celebrated people have certainly founded various types of organizations ranging from conventional for-profits, to nonprofits and philanthropic endeavors, academic conversations have typically taken the perspective of agentic entrepreneurs leveraging their personal and social capital (e.g., their brand and media attention) in pursuit of their goals. For example, actors and athletes—such as Jessica Simpson, MaryKate & Ashley, Roger Federer, Jessica Alba, Angelina Jolie, Ashton Kutcher, to name just a few—have launched for-profit businesses in fashion, cosmetics, fast-moving household consumables, as well as non-profit foundations with social missions. We contribute a novel perspective on this phenomenon, from the *organization's* point of view: As a respected thought-leader in the venture's domain, the celebrity founder in Study III is used by the organization to draw in partners who clearly express their motivations for supporting the organization in terms of their ability to be associated with the founder.

Finally, the latency of an organizational goal—i.e. the fact that it is not made explicit—may be linked to the organization's sociocultural context. One can imagine that in the context of a sustainable mission venture, despite the fact that maintaining the founder's personal brand has demonstrable direct benefits for the organization's continued ability to pursue its sustainable mission, making his brand and image an explicit goal of the organization may not be well received by stakeholders—and may even undermine the organization's work and reputation. Such is a Western perspective. On the other hand, within a different cultural context, maintaining the "face" or reputation of a founder is more likely to be perceived as a "legitimate" organizational goal (Hwang, 1987, 2012).

Societal Level: Defining & Understanding Sociocultural Contexts

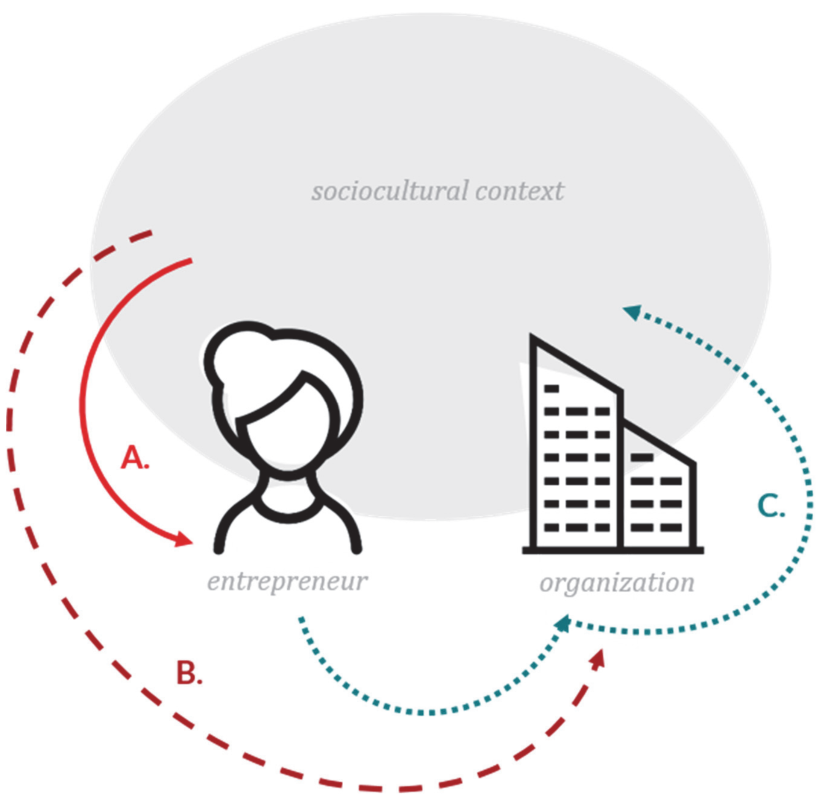
Finally, this thesis also makes important contributions regarding the nature of sociocultural contexts that are relevant for entrepreneurial behavior. The vast majority of contextualized studies of entrepreneurs have referenced national culture (e.g., GEM, 2018; Uhlaner & Thurik, 2004; Stenholm et al., 2013; Autio et al., 2013). However, based on the wide range of contextual perceptions observed in Taiwan—and even with the single city of Taipei, Study I suggests that it is localized, rather than national, sociocultural context that is most influential to individuals' strategic entrepreneurial action. This finding reflects a trend away from nation-level generalizing in cultural studies within the broader psychological literature, adding to other evidence that nation-level contextual studies are too broad, sacrificing important variation for the sake of generalizability at a level at which people generally "chunk" information (Vignoles et al., 2016.; Hwang, 2012). The implication is that we should make fewer generalizations based on national boundaries, seeking rather other sociocultural dimensions and categories that describe or predict strategic entrepreneurial action. Some notable works moving toward more granular contextual settings include Jack & Anderson's (2002) study of the embeddedness of rural entrepreneurs, McKeever and colleagues' (2015) study of entrepreneurs' engagement "with place and community" (p.50), and Audretsch and colleagues' investigation of entrepreneurial choice linked to religion and social class (2013). In line with this is an emergent literature on community-based entrepreneurship (Hertel et al., 2019).

The contextualization of entrepreneurship is gaining increasing attention from researchers (Baker & Welter, 2020). However, important questions remain about how entrepreneurs interact with their environments, and how sociocultural factors play into entrepreneurial processes and outcomes.

Promising Directions for Future Research

This thesis has aimed to contribute to understanding of one of the pressing questions on the role of business in society—namely, the long-term cycle of how sociocultural environments influence founders, who in turn shape organizations that collectively influence the environment around them. Clearly, this aim goes beyond the scope of a single thesis. In closing, I suggest several promising directions for future research on entrepreneurship within and across sociocultural contexts. These are organized into three discussions: (A) The influence of sociocultural context on the entrepreneur, (B) The influence of sociocultural context on entrepreneurial ventures, and (C) The shaping of sociocultural context through entrepreneurship.

5.1. Promising directions for future research on the relationships among sociocultural context, entrepreneurs, and their organizations



A. The influence of sociocultural context on the entrepreneur

Study I suggested the importance of *identity capital* as a resource enabling entrepreneurs to engage in innovation. However, this remains to be explored in more depth. Individuals' ability to develop identity capital has been associated with inhabiting a particular social structure—namely, that of a late-modern society (Côté, 1996); in this respect, to what degree is innovativeness (in offerings, business models, etc.) a function of entrepreneurs' surrounding social structures? In what ways does identity capital enable innovation? What other aspects of the entrepreneurial process are facilitated by founders' identity capital?

Legitimacy has been investigated primarily in terms of establishing legitimacy with relevant stakeholders, such as investors or customers. As entrepreneurs' self-construal becomes increasingly recognized as an important input determining entrepreneurial cognition and behavior, we might extend investigation of legitimacy to the level of the entrepreneur herself. To what extent do entrepreneurs perceive *themselves* as legitimate? (As individuals? And as entrepreneurs?) How are these perceptions shaped by their sociocultural context? In light of increasing public awareness of—and open discussion of (e.g., Edwards, 2016)—"impostor syndrome," to what extent do founders' perceptions of themselves as impostors, or legitimate entrepreneurs, determine important decisions during venture creation? There is an opportunity to extend the concept of legitimate actors to a cross-cultural perspective accounting for multiple levels of entrepreneurial legitimacy—in the eyes of self, community and society.

We can also investigate here how sociocultural context orients entrepreneurs to instrumentalize venture creation, and how this instrumentalization is experienced. Data collected for Study I reveals that some entrepreneurs use venture creation as an excuse to buy themselves time alone and a space—i.e., their workshop, their place of business, representing both a physical and social space—in which they can modify, to some extent, the social norms of their surrounding society. During data analysis, "emancipation" emerged as an original conceptual category (even before I became aware of Rindova's (2009) theoretical piece on entrepreneurship as emancipation). However, for some, entrepreneurship does not represent an optional opportunity to gain autonomy, but rather a necessary activity to maintain basic subsistence (Dencker et al., 2019; Brewer & Gibson, 2014; Baker & Welter, 2020). Further empirical work might investigate the conditions under which individuals *perceive and experience* entrepreneurship as emancipatory and/or restricting. The two are not necessarily mutually exclusive—i.e. entrepreneurship may initially present itself as restricting and evolve into an emancipating experience, or vice versa. Furthermore, an individual's *experience* of entrepreneurship as emancipating or restricting may not correspond directly to researchers' typical categorization of opportunity vs. necessity entrepreneurs.

Referring back to the extremely localized perceptions of sociocultural context that were influential in framing entrepreneurs' attitudes toward entrepreneurship in Study I, a promising future direction entails further investigation into communities surrounding entrepreneurs, including sociocultural elements that define startup networks, accelerators, online communities; even an entrepreneur's most important personal relationships.

B. The influence of sociocultural context on entrepreneurial ventures

Future work might also explore the relationship between organizational hybridity and sociocultural context. Particularly with respect to manifest and latent hybridity, both theory and practical knowledge could be advanced by further understanding the characteristics of sociocultural contexts within which certain types of organizational goals may be viewed as possessing less—or even zero—legitimacy. In such cases, organizations might still experience the benefits of dual mission synergies by pursuing both, while keeping the potentially "illegitimate" element informal and implicit. Such work might build on studies that have investigated ways in which hybrid organizations respond to competing external demands, or internal demands of the coexisting elements of their hybridity (Zahra et al., 2009 ; Jay, 2013; Pache & Santos, 2013 ; Pratt & Foreman, 2000 ; Oliver, 1991; Kraatz & Block, 2008).

As an example, the concept of social entrepreneurship—representing hybrid social and economic goals—has been little understood in China, where social goals are traditionally pursued through public (government) initiatives, and financial goal through private enterprise. The term "social business" itself appears to be an oxymoron in Chinese script (Zhao, 2012).

C. Shaping sociocultural context through entrepreneurship

"Designing society" emerged as an identity-driven objective for numerous founders in Study I. It also accurately reflects the goal of founder Bertrand Piccard and the Solar Impulse Foundation we investigated in Study III, as well as thousands of social entrepreneurs around the world. It is very clearly the agenda put forward by grand challenge entrepreneurs. The literature on cultural entrepreneurship has sought to understand how entrepreneurs engineer society, and how they draw on cultural resources and enact cultural processes to do so (DiMaggio, 1982, 1986; Johnson, 2007; Gehman & Soublière, 2017; Lounsbury & Glynn, 2019). Many questions remain open. How can we measure entrepreneurs' impact on society and cultural change? How, individually as a founder, and as an individual organization, do they influence their social context at a local level at first, and as they grow in influence, at increasingly higher levels (region, state, nation, globally). How do communication technologies accelerate this impact and amplify entrepreneurs' efforts to design society? How, collectively, do entrepreneurs—through their ventures and its outcomes (products, services, etc.)—influence the overarching social context, including values, and routines, etc.

In closing, this thesis represents one humble step toward a deeper understanding of entrepreneurship across sociocultural contexts. My hope is that this work adds value for those who seek to better understand themselves and those around them, how we are shaped by forces inside us and around us, and how all of who we are comes together in what we create.

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Appendices

APPENDIX TO STUDY I

Appendix A.

Methodological Note from the Field: Sourcing Research Assistance from a Missionary Community

I initially underestimated the value of my local contacts—not researchers, but rather missionaries—when embarking on the study set in Taiwan. Among these were both native Taiwanese and foreign-origin longtime residents. The insights I gained from living with a local missionary family during my fieldwork were invaluable. Among this community, I recruited two interpreters to accompany me during fieldwork, particularly interviews. Beyond the time we spent conducting and debriefing formal interviews, my interpreters showed me multiple faces of Taipei and the surrounding region: experiences which allowed me to *experience* the feeling of operating in the various social structures that comprise Taiwan—from those governed by tradition, to those that resonated with the enthusiastic pioneering spirit of rising stars in industrial innovation, to those I can best describe with the experience of watching young twenty-something year olds pose shamelessly for photoshoots against jungle-themed wallpaper in crowded "wenqing" hipster cafés, acquiring images of themselves holding ten-dollar lattes until they were cold. I dubbed this latter group, members of the "Instagram society".

Three factors convey the value of having selected interpreters and a research assistant from among this missionary community. First, this is a population that is dependent on their ability to connect with people in order to accomplish their mission. They are deeply invested—not spontaneously, but over the span of years—in understanding the social fabric of the people groups they serve (and belong to), developing relationships, understanding and exchanging around how people fundamentally see the world. One of my interpreters, an American-Finnish man who had been in Taiwan for seven years and started a family with a Taiwanese woman, conveyed deep insights into interpersonal dynamics in American/European vs. Taiwanese contexts. In the spirit of Gadamer's (1960) hermeneutic tradition, this interpreter's contribution played an instrumental role in enabling me to fuse my horizon as a Western-born, Western-educated researcher, with the horizons of my informants.

Second, it immediately became apparent that my interpreters were skilled in putting informants at ease, connecting with them, and creating smooth segues into meaningful discussion. They were experienced in facilitating conversations in which deeply personal perceptions of various aspects of sociocultural context could be shared; no matter whether the topic was family background, politics, philosophy, faith and religion, worldviews or values, I could count on my interpreters for tactful and sensitive translations. This social intelligence helped me to establish and maintain trust with my informants, leading to subsequent touchpoints and recurring interactions in many cases.

Third, from a practical perspective, this community is familiar with non-conventional working hours, short term and seasonal projects; I found assistants generally flexible and available for part-time work and even spontaneous field visits.

Collaboration between missionaries and scientists is not new. Anthropologists, in particular, have benefitted from—and sometimes bemoaned—engagement with, and the overall presence of, missionaries during their fieldwork (Michaud, 2016; Stipe, 1980). The journal of *Missiology* even published a special issue on the relationship between missions and anthropology (1996). In management research, a similar tradition does not necessarily exist. Given the richness of this resource for accessing both primary and secondary data, as reflected in *Essay I*, scholars who are interested in the interaction of context and individuals in organizations may benefit greatly from reaching out for informal or formal discussions and collaboration on empirical studies.

APPENDIX TO STUDY III

Appendix B. Additional Evidence for Variation in Mission Perceptions at the Solar Impulse Foundation

Vague	**Divergent**	**Reinforcing**
to be frankly, to be totally honest with you, I was not proud to be in the foundation in the first two months, I guess. This is because I didn't really have a good sens of what everybody is doing. And what everybody's thinking that foundation is going ... there is so many people thinking differently. And I don't see a coherent force to bring the foundation forward [L6]	I sense that [the support team] has not always been extremely aligned with Bertrand and I think that he is someone who trusts easily. And at present it's complicated because we [the Foundation] is calling into question quite a lot of things, because they haven't been working. I mean, because they don't work. [S5]	The only one who can go look for millions [of Swiss francs] is Piccard. It's not me. In any case, the entire planet wants Bertrand and doesn't want to speak to someone else, he is the emblem. It's him, and there you have it. [HQ2]
In my opinion, the idea of gathering all these solutions by means of this Foundation, then I mean, for me it's too vague. I mean, then how can city halls in France use them, or towns in Switzerland, or countries, cantons, the other contries... for me this is still so vague [HQ3]	somehow there was mismatch between what Bertrand wanted and what was created. I wasn't there. But I think if we could start all over, then we should make this procedure a lot less complex and even remove the expert step or just hire five internal in-house experts who do the common sense [screening] themselves [L2]	Using the visibility of the Foundation has the power to *drive* public opinion and the opinion of influential people, so aiming for the top. Because the Solar Impulse Foundation has the-- above all Bertrand, in the person of Bertrand, [the SIF] has contacts and visibility and credibility. So to use this credibility to go to the height in these decisions [L13]

[Bertrand Piccard] is not clear... he's definitely not clear! [L11]

Bertrand works for himself, not for the planet. He works for his own visibility, not for the visibility of the Solutions [L9]

For someone [like me] who works in communication, in terms of storytelling, having a hero in the narration is perfect for being able to tell a story and to motivate people. [S11]

I had a bit more of... maybe naively--naively this idea that I would arrive at the Foundation, and that there would be a very clear idea of what we were going to do. ... It's the unknown, we don't know what we are doing. But that is also the magic of the project--we don't know what we are doing. And when I say "evolution of the strategy", it's not always necessarily the strategy, it's tactical evolution as well. ... I think there is a true need to improve on the level of, of concreteness. We are missing concrete [things]. I think that Bertrand's vision is very... visionary, let's say, [but] because it's a vision, there is nothing concrete. [L10]

I found the meeting of the other day very interesting, because you see that we clearly don't have the same objective. Having said that, even if the idea is to serve a final objective, I'm very happy to think about that with [a colleague] for example. [That colleague] deals with issues that concern the quality of the label, the process, etc., but this doesn't serve the purpose of the project which is, I think, more important. Today I'm a bit frustrated to see that we move at a slow pace. And we move at a slow pace because, I believe, that not all the forces are converging towards the success of the mission [L14]

Without him we can’t do anything, so he works for the Foundation. He raises money for the foundation, he raises… all this is for the Foundation. At the same time, the foundation feeds his message. Because we do concrete things and I think it’s also important to continue that [L11]

I really struggled to grasp the purpose of what we do. And this is why I like to have a clear purpose [S9]

Let's stop calling it 'Efficient Solution Label', instead we're going to call it the 'Bertrand Piccard Label'! [L18]

If I have the choice between two events I try to take the one that can potentially also be useful for us.
- *When you say "us", are you referring to the Foundation or to Bertrand?*
Both, it's precisely that I try to think of both. Because in the end the one feeds the other. For me it's the fact that he is at the head of this foundation that also renders him desirable, and so for me they are, at heart, closely related. Bertrand is our flagship! It's even a bit of a problem that we have frrom time to time-- that many of the members or collectives that work with us are interested in the Foundation, but at the core they want Bertrand. We should really have 10 Bertrand Piccards to send to all the events! Since, for [partners], to have the Solar Impulse Foundation right now means "slash to have Bertrand", meaning that to send someone else in his place... yes, it's ok, but it's better if it was him. So he remains extremely closely tied to the heart of Solar Impulse. [HQ6]

Bertrand has never taken the time to ask himself what the governments want [L18]

My motivation is in terms of Bertrand it's helping to inform perspectives and use him. I mean, not from a selfish sense, but ultimately he is a mouthpiece. He's a megaphone [S3]

There is a dichotomy between Bertrand and his interests, and the interests of the Foundation [S7]	Without him we can't do anything, so he works for the Foundation. He raises money for the Foundation, he raises… all this is for the Foundation. At the same time, the Foundation feeds his message. Because we do concrete things and I think it's also important to continue that [L11]
I think there there is a sort of rift between Bertrand and his HQ and the rest of the enterprise [S13]	the use of Bertrand to advertise the mission and collaborate with other like-minded organizations has been really good [L3]
He needs to stay relevant, for me that right there is the bottom line of the story. He needs to stay relevant [...] Whatever it takes [...] The problem is that the objective was: Bertrand needs stay relevant [S9]	We struggled with people outside the Communication team, who said indeed: "why are we putting all this accent on Bertrand?" - *Indeed, why don't the get it?* First of all, because they have different and needs, more concrete, that are not needs of communication or branding, but rather needs like, "I want more Experts, I want more Solutions". Therefore, they say, "will this article on Bertrand help me collect more Solutions?", so they start from an approach which is not a communication approach. - *They look at their tomorrow's benefits, or even today's!* - Correct! While we look at the image of the Foundation, which makes that when a person is approached by someone from the Outreach, the person says, "ah sure, I know the Foundation is doing things for the ecology", so... we provide global information. Sometimes it sounds like, some people say, "okay, how many Experts did you article bring, or your social media post?". It doesn't work in that way. Nobody spends two hours per week of his time because he read a post. You need more. The post provides information, it allows you to stay involved, but if you do that there's another reason, because either you met someone in person, or it helps you in your career, or in your status as engineer, or maybe in your job you can't achieve that impact that motivated you to become an engineer at the beginning, and now it allows you to get it, but all this doesn't come from the post. The post is part of a process, it raises awareness, but if you need action, it has to be part of a global thing, and here we wanted to explain to the team that communicating on Bertrand creates this... 1) it differentiates us from other foundations: what are we?

We're not UN Environment, we're a foundation that was born from the story of Bertrand Piccard, who wanted to make his round-the-world flight, which then led him to create Solar Impuse, and then led him to the cleantech. This is our story as a foundation, and 2) it's part of that "love for the brand" part: people like to keep in touch with the Foundation also because they are inspired by Bertrand. Therefore, the fact to keep nurturing this admiration for Bertrand leads to admiration for the Foundation. So [the communication campaign on the anniversary of the balloon flight] also made sense in terms of communication around the Foundation. [S11]

Curriculum Vitae

Shirah E. Foy

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EDUCATION

Docteur ès Sciences (PhD)
2015-2020 (expected)

École Polytechnique Fédérale de Lausanne (EPFL), College of Management of Technology
Entrepreneurship & Technology Commercialization

Thesis:	*Entrepreneurship across Sociocultural Contexts*	
Committee:	Marc Gruber *(thesis supervisor)*	Howard Aldrich
	Matthias Finger	Wendy Smith

Master of Science
2012-2015

Aalto University, School of Business
Strategy, Information Technology

Bachelor of Business Administration
2008-2012

Belmont University, Jack C. Massey College of Business
Honors Program: International Entrepreneurship*, Russian Language
Deans List; Presidential Award
Scored in the top 5% nationally (USA) of graduating students, Educational Testing Service (ETS) Major Field in Business (Princeton, NJ)

**I petitioned to create this "major" based on existing courses and external courses. I defended the curriculum before the Honors Program Committee and was granted approval.*

PUBLICATIONS

Under Review

Foy, S, Gruber, M. [Title redacted]. 1st Revise & Resubmit at *Academy of Management Journal*.

Working papers

Foy, S. The Shifting Philosophical Foundations of (Cross-)Cultural Research: What 'One Mind, Many Mentalities' means for Organization Scholars. In preparation for *Organization Studies.*

Foy, S. Identity Alignment through Entrepreneurial Venturing: The potential of market mechanisms for peacebuilding. In preparation for *Journal of Conflict Resolution.*

Bergamini, E., **Foy, S.,** & Gruber, M. Latent Hybridity in Organizations: When Logics are Reinforcing… Until They're Not. In preparation for *Administrative Science Quarterly.*

Hertel, C. & **Foy, S.** Community-Based Entrepreneurship as an Alternative Means for Tackling Societal Problems: Comparisons with Top-Down Approaches, Social Movements, and other Types of Entrepreneurship. In preparation for *Academy of Management Perspectives.*

Conference papers

Foy, S., Gruber, M. (2018). Under the Eastern Sun: Expanding the Horizons of Founder Identity Research. *Frontiers of Entrepreneurship Research.*

CONFERENCE PRESENTATIONS

2020 The Shifting Philosophical Foundations of (Cross-)Cultural Research: What 'One Mind, Many Mentalities' means for Organization Scholars
First Colloquium on Philosophy and Organization Studies (PHILOS), Rhodes, Greece

2020 From Vision to Action: How Employees Struggle to Enact the Promises of a Visionary Heropreneur
Babson College Entrepreneurial Research Conference, University of Tennessee, Knoxville

2019 "No Man is an Island": Examining Founder Identity and New Firm Creation across different Social Structures
Asian Academy of Management Meeting, Indonesia

2018 Under the Eastern Sun: Expanding the Horizons of Founder Identity Research
Babson College Entrepreneurial Research Conference, Waterford Institute of Technology, Ireland

Under the Eastern Sun: Expanding the Horizons of Founder Identity Research
Academy of Management Journal Paper and Idea Development Workshop, Toulouse, France

2016 Who is Who? How founders in Southeast Asia create social categories and define social responsibilities
ETH-EPFL Entrepreneurship Research Retreat, Jongny, Switzerland

2015 An Entrepreneur's Voyage of Discovery
ETH-EPFL Entrepreneurship Research Retreat, Pontresina, Switzerland

2014 Financial Capital, Social Norms and Entrepreneurial Intent: Evidence from a Russian Context
Babson College Entrepreneurship Research Conference, Western University, Ontario, Canada

TEACHING EXPERIENCE

I have experience with curriculum development spanning the process of entrepreneurship (including social and sustainable entrepreneurship). The bulk of my lecturing has been on new venture strategy, human-centered design, design thinking, business model development, entrepreneurial marketing. Teaching contexts have included early stage technology commercialization as well as professional development more generally, and lectures given in both English and French. I particularly enjoy engaging with students from non-business educational backgrounds and non-western cultural backgrounds – especially as we discuss and awaken the students to an awareness of conventional and non-conventional approaches, perspectives and assumptions. The entirety of the experience listed below was at or in collaboration with EPFL.

Spring 2020 HUM-361 Introduction to Social Entrepreneurship (Bachelor): Guest Lecturer (Strategy)
Fall 2019 MGT-644 Conducting Qualitative Research (Doctoral): Proposed course concept and scope; Recruited external expert lecturer; Coordinated marketing, student registration and logistics; Teaching Assistant
Spring 2019 MGT-413 Entrepreneurship and New Venture Strategy (Master): Guest Lecturer (Design thinking; Strategy)
Spring 2019 HUM-361 Introduction to Social Entrepreneurship (Bachelor): Guest Lecturer (Design thinking; Strategy)
Fall 2018 ENG-632 Entrepreneurial Opportunity Identification and Exploitation (Doctoral): Invited as Student Coach
Spring 2018 MGT-413 Entrepreneurship and New Venture Strategy (Master): Teaching Assistant
Spring 2015-Fall 2017 Launching New Ventures: Entrepreneurship & Strategy for Technology-Driven Startups (EPFL Mixed-level Massive Open Online Course [MOOC]): Project Coordinator and Teaching Assistant; Co-developed curricula, scripting & filming of lectures
Fall 2017 ENG-632 Entrepreneurial Opportunity Identification and Exploitation (Doctoral): Invited as Student Coach
Fall 2017 HUM-348 Introduction to Entrepreneurship (Bachelor): Teaching Assistant
Spring 2017 Human Centric Design Bootcamp for Software Developers (Master): Block course created for EPFL in partnership with EDACY (edacy.com) and delivered at Cheikh Anta Diop University in Dakar, Senegal: Created and Coordinated Curriculum; Recruited international expert lecturers; served as Instructor and Interpreter (English-French) during the course
Fall 2016 HUM-348 Introduction to Entrepreneurship (Bachelor): Teaching Assistant
Fall 2015 HUM-348 Introduction to Entrepreneurship (Bachelor): Teaching Assistant
Fall 2015 MGT-413 Entrepreneurship and New Venture Strategy (Master): Teaching Assistant

PROFESSIONAL EXPERIENCE

2016-present Academic Partner, supervising entrepreneurship & design thinking curriculum
EDACY (Switzerland, Senegal, Oman)

2013-2019 Co-founder
Fintech startup commercializing data as a service (Finland)

2018 Jury Member & Startup Mentor for the Al Shabab Youth Tech Ideathon
Oman National Youth Program for Skills Development (events.withgoogle.com/oman-ideathon)

2017 Advisory Board Member, Marketing, Sales & Advertising
Vocalens (wearable technology for people with visual impairment, *a Cambridge University spin-out*)

2013 Founder
Pointe3 Design Communications (Finland)

2012 Recruiting Assistant

	New York Life Insurance (Tennessee)
2010-2012	Tutor in social sciences and languages for 5^{th}-8^{th} grade students Scholastic Success, LLC (Tennessee)
2011	Intern, U.S. Commercial Service United States of America Department of Commerce (Tennessee)
2011	Intern, Public Diplomacy, Political and Economic Affairs Sections U.S. Consulate General St. Petersburg (Russia), United States of America Department of State
2008	Legislative Assistant Office of Representative Dennis Richardson, State of Oregon House of Representatives
2007	Field Representative The Leadership Institute (Washington DC; Tennessee)
2005-2006	Intern Office of U.S. Representative Greg Walden, United States Congress
2005	Intern NBC / KOBI News Channel 5 (Oregon)

INVITED SPEECHES

2020	"Qualitative Data: What, Why and When?" for EPFL Data Champions
2018	"Willing to 'sacrifice' profits in return for social return? Culture helps explain why some founders choose this path", Global Good Congress (goodfestival.ch) Keynote Speaker, "A Healthy Me for a Healthy We: Social identity and leadership", Q Commons (qcommons.com) Guest Speaker, Mentor during Women's Entrepreneurship Week, HEC Lausanne
2017	Master of Ceremonies, Global Entrepreneurship Week, EPFL "Organizational Identity and Business Models", at Taiwan-based NGO Step 30
2015	Keynote Speaker, Global Entrepreneurship Week, "From business idea to business model", CERN (European Center for Nuclear Research) (home.cern)
2014	"Transparency: The Best Regulator", Oregon Federation of Republican Women Board of Directors Meeting

FELLOWSHIPS & SCHOLARSHIPS

2015-present	Sandbox – Handpicked global community of 1000+ young leaders and entrepreneurs (sandbox.is)
2018	REALITY Impact Leadership Journey Israel, Charles and Lynn Schusterman Family Foundation
2013	Student Reporter on Social Entrepreneurship, OIKOS + Schwab Foundation (schwabfound.org)
2012	Lumos Student Travel With A Purpose Award Program, Lumos Foundation - US $20,000
2011	Benjamin A. Gilman International Scholarship - US $6,000

AWARDS

2019	"Best Reviewer" Award for *Entrepreneurship* Track, Asia Academy of Management Meeting
2019	Honorable Mention; Photograph taken during fieldwork selected for the #PictureYourResearch Annual Calendar, MAXQDA software for qualitative data analysis
2017	Work selected for the Photography Revealing Culture series, School of Russian & Asian Studies (sras.org)
2012	Presidential Leadership Award (chosen by the university president to be awarded to 1 graduating senior each year), Belmont University
2012	Finalist, Network of International Business Schools Case Competition (nibscasecompetition.org), Erasmus University, Netherlands
2008-2012	Dean's List, Belmont University
2010	Bruin Award for Exceptional Student Leadership, Belmont University
2005-2006	Honor Roll, Rogue Community College

STUDIES ABROAD & NON-DEGREE PROGRAMS

2017-2018	Jubilee Centre, Cambridge UK: Biblical Foundations for Public Life year-long online course
2013	ESADE, Spain: Innovation in Action, 3 month project-based learning course (with Aalto University)
2012	Guatemala: Fair Trade & Social Entrepreneurship, 3 week study abroad (with Belmont University)
2011	Odessa Language Study Centre, Ukraine: Russian Language intensive summer school, 2 months

2011	St. Petersburg State University, Russia: Russian Language, 1 semester
2008	Beijing, Xi'an, Shanghai, China: Global Youth Leadership Summit, 3 week study abroad
2006-2007	Brussels, Belgium: St. Dominique Secondary School, year-long study abroad
2004	Washington DC, USA: National Youth Leadership Summit, 1 week

PUBLICATIONS (NON-PEER-REVIEWED)

Online articles

Foy, S. 2013. "Youth for Technology Foundation: Reinvigorating Rural Communities through Reverse Migration & Youth Empowerment." *Huffington Post,* June 15, 2013.

Foy, S. 2013. "21st Century Robin Hood Introduces Altruism to Investment Banking." *Huffington Post,* September 24, 2013.

PROFESSIONAL ASSOCIATIONS

2020	EPFL Data Champions, cross-disciplinary community around research data management
2012	Alpha Chi National Collegiate Honor Society
2012	Phi Sigma Iota Language Honor Society
2011	Sigma Nu Ta Entrepreneurship Honor Society
2011	Beta Gamma Sigma Business Honor Society

SERVICE

Academic Service

2020	Reviewer for *Entrepreneurship Division; Organization and Management Theory Division,* Academy of Management Annual Meeting
	EPFL Data Champion, serving the research community with data management support
2019	Ad Hoc Reviewer for *Academy of Management Journal*
	Reviewer for *Entrepreneurship* Track, Asia Academy of Management Meeting
	Reviewer for *Entrepreneurship Division; Managerial & Organizational Cognition Division,* Academy of Management Annual Meeting
2018	Reviewer for *Entrepreneurship Division; Managerial & Organizational Cognition Division; Teaching & Learning Conference,* Academy of Management Annual Meeting
2017	Reviewer for *Academic Institutions, Science, and Unconventional Strategies for Innovation* Track, Strategic Management Society Annual Meeting
	Reviewer for *Entrepreneurship* Division, Academy of Management Annual Meeting
2016	Facilitator, Entrepreneurship Working Group, Secretary General of the Network of Excellence in Engineering Sciences of the French-speaking Community (RESCIF)

Entrepreneurship Ecosystem

2016-2018	Ambassador to French-Speaking Switzerland, >>venture>> - Switzerland's premiere startup competition (venture.ch)
2016, 2018, 2019	Judge & Startup Mentor, MassChallenge Switzerland accelerator (masschallenge.org)
2017	Jury Member, EPFL Choice Award at EDACY Bootcamp (edacy.com)
2016	Judge & Startup Mentor, IMAGINE IF! Accelerator for science ventures, Innovation Forum (inno-forum.org)
2016	Judge, Startup Competition, Start Lausanne (startlausanne.ch)
2016	Judge, EPFL Young Start-Up Pitch Contest

Humanitarian & Community Service

2015-present	Westlake Church Lausanne, Switzerland, youth and music volunteer
2007-2014	Annual Guest Speaker on study abroad, Hedrick Middle School, Oregon
2012	English Teacher, Pema Chholing Tibetan Buddhist Monastery, Solukhumbu, Nepal
2010-2012	Crosspoint Church, Tennessee, volunteer serving young adults
2011	Freedom's Promise, NGO working to prevent human trafficking, Tennessee
2007	Animator at an orphanage summer camp, Bosnia

SKILLS & INTERESTS

Languages	English (native), French (fluent), Russian (B2), Finnish (conversational), Spanish (conversational)
Technology	MAXQDA, R, SPSS; Microsoft Excel, PowerPoint; Adobe Suite; social media, online publishing
Hobbies	Cross country ski marathons, hiking, yoga, music: vocals, harmonica, flute

“I do not believe that we live in two worlds, the mental and the physical—much less in three worlds, the mental, the physical and the cultural—but in one world, and I want to describe the relations between some of the many parts of that one world.”

John R. Searle
Mind, Language and Society (1998:6)

“I do not want my house to be walled in on all sides and my windows to be stuffed. I want the cultures of all the lands to be blown about my house as freely as possible. But I refuse to be blown off my feet by any.”

Mahatma Gandhi
(Lee, Masuda, Fu & Reiche, 2018:181)

“Science, my lad, is made up of mistakes, but they are mistakes which it is useful to make, because they lead little by little to the truth.”

Jules Verne
Journey to the Center of the Earth (1864)