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A relational perspective on hybrid organizing across the micro, meso, and macro-level contexts of social entrepreneurship

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Abstract

This thesis advances the theoretical and empirical understanding of hybrid organizing in the field of social entrepreneurship across micro, meso, and macro-level contexts. On the micro-level, it concentrates on the individual social entrepreneur as a hybrid social actor. On the meso-level, it focuses on social enterprises as hybrid organizations. On the macro-level, it is concerned with social entrepreneurship as a hybridizing mechanism across different institutional contexts. Three research papers are presented in this thesis, two qualitative papers and one conceptual paper. While each paper contributes to existing research on hybrid organizing for one particular level, the overall thesis provides critical implications for a relational, cross-level understanding of hybrid organizing and the Bourdieusian theory it applies.

Paper 1 addresses the micro-level of hybrid organizing and theorizes on the potentials and perils of prosocial power in the context of transnational social entrepreneurs who leverage a multi-spatial embeddedness for their operations in vulnerable places. The paper reveals how prosocial power is embodied by transnational social entrepreneurs, as well as why and how the prosocial intentions and behaviors of these hybrid entrepreneurs can result in positive and negative prosocial impacts on the disadvantaged others they seek to support.

Paper 2 addresses the meso-level of hybrid organizing from an institutional logics perspective and theorizes on the re-enchantment of collegiality as a previously marginalized polycratic governance concept. It discusses the potential of collegiality for the intra-organizational governance of hybrid enterprises as post-bureaucratic organizations for which alternative governance approaches with a non-bureaucratic logic remain largely absent or underdeveloped.

Paper 3 applies institutional theory and addresses the macro-level of hybrid organizing by introducing an institutional nexus perspective of social entrepreneurship that links the existing institutional void and institutional support perspectives. It conceptualizes the critical influence of different migration directions and human capital endowments that exist among transnational social entrepreneurs. The paper presents a contextualized framework that expands the limited theoretical development in contemporary transnational entrepreneurship research for a better understanding of context-spanning hybridity.

Lay summary

The social enterprise is an innovative form of organization that combines the traditional business function of making profits with the mission to solve social and/or environmental problems that we traditionally associate with charities. This is often described as a form of *hybrid* organizing, in which different ways of doing things are combined to create new solutions. However, hybridity can exist in many different shapes, and a reduction to the social and economic dimensions is clearly insufficient. Therefore, this thesis looks at additional aspects of hybrid organizing in the field of entrepreneurship at three different levels. At the individual level, it considers *transnational* social entrepreneurs, whose personal experience combines multiple national contexts, as hybrid social actors whose power to enact change for their beneficiaries represents a hybrid force whose impacts can be not only positive, but also negative (despite good intentions). At the organizational level, it addresses social enterprises as an organizational form that requires a special way of governance that allows these organizations to manage their primarily social mission without having to adopt the primarily economic governance principles of traditional, bureaucratic organizations. As an alternative, it proposes a *polycratic* governance model, a hybrid form of combining elements of *collegiality* (a decentralized and relatively egalitarian governance model) and bureaucracy (a more centralized and hierarchical governance model). At the international level, the thesis addresses context-bridging social entrepreneurship and explores the impact of different migration directions and human capital levels on the effectiveness of social entrepreneurs' activity. These studies on three levels are brought together with a relational perspective for which the theory of practice framework of Pierre Bourdieu is applied. The thesis makes several contributions to the entrepreneurship literature and the fields of social entrepreneurship, transnational entrepreneurship, prosocial organizing, and organizational governance in particular. In each paper, as well as for the thesis in general, a range of suggestions for future research is provided which hopefully inspires other scholars to further enrich the knowledge base on hybrid organizing in relation to social entrepreneurship and beyond.

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1 Introduction

1.1 Hybrid organizing on the micro, meso, and macro-level

Hybridity, in its broadest sense, describes a blend of separate elements or systems that would normally not go together. In the field of organization and management theory, hybridity refers to the combination of divergent identities (who we are and what we do), forms (organizational structures and governance mechanisms), or logics (behavioral templates) that exist as core elements in an organizational context (Battilana et al., 2017). This hybridity can be a source of innovation and new market opportunities (Dalpiaz et al., 2016; Jay, 2013), comparative efficiency advantages (Berti & Pitelis, 2021), broader stakeholder support (Pache & Santos, 2013), resource access (Wry et al., 2014), and institutional change (Haveman & Rao, 2006). However, the blending of divergent identities, forms, or logics also creates an 'institutional pluralism' (Kraatz & Block, 2008, 2017) that results in an 'institutional complexity', which can lead to significant challenges and tensions for those organizational actors who are exposed to it (Besharov & Smith, 2014; Greenwood et al., 2011). This eventually requires organizational actors to engage in skillful hybrid organizing in order to deal with the institutional multiplicity that surrounds them.

Since hybridity can be present at multiple levels of the organizational context (Smith & Besharov, 2019), this thesis responds to calls for additional research across levels and across perspectives in relation to hybrid organizing in order to acquire a more comprehensive understanding of the phenomenon and to leverage the higher explanatory potential of such an approach (Battilana et al., 2017). It does so by exploring various empirical phenomena of hybrid organizing on a micro, meso, and macro-level and by using different theoretical lenses. Such a multi-layered analysis is also critical for a better understanding of the various entrepreneurial phenomena that impact and occur at different societal levels at the same time (Aldrich & Martinez, 2010; Bolzani et al., 2020; Davidsson & Wiklund, 2001; Karataş-Özkan, 2011; Tracey et al., 2011). In this sense, the objective of this thesis is to advance the empirical and theoretical understanding of hybrid organizing in the particular field of social entrepreneurship, which I see as one of the most potentially fruitful domains for seeking insight into pluralistic organizational dynamics. In the following sections of this introduction, a brief overview is given about the broader understanding of hybrid

organizing on each of the three contextual levels before I review the role of hybrid organizing in the particular field of social entrepreneurship. This is followed by an outline of the contributions this thesis makes through its three principal papers and the development of a relational perspective on hybrid organizing across the micro, meso, and macro-level contexts of social entrepreneurship.

1.1.1 Hybrid organizing on the micro-level

On the micro-level, hybrid organizing relates to individual human actors who can hold divergent or competing values or logics that influence their personal identity and organizational behavior (Almandoz, 2014; Besharov, 2014; Shepherd & Haynie, 2009; Smets et al., 2015). In a study of drug court professionals, for example, McPherson and Sauder (2013) outline among four different types of decision-makers the presence of four dominant and conflicting logics - including a criminal punishment logic, a rehabilitation logic, a community accountability logic, and an efficiency logic - that guide their professional behavior. The authors find that the contradictory nature of these logics significantly complicated the negotiation of their decisions about how to proceed with drug court participants. In a different study of members of a natural food cooperative, Ashforth and Reingen (2014) present another example of individual-level hybridity in the form of contradictory personal identities (idealist versus pragmatist identities) that they discovered among organizational actors and that proved to be a source of intra-organizational conflict. Other authors outline how an entrepreneurial identity is often in a psychological hybridity-tension between a need for distinctiveness and a need for belonging (Shepherd & Haynie, 2009).

While such insights connote micro-level hybridity as a rather problematic issue that ought to be resolved wherever possible, Smets et al. (2015) present a different perspective that depicts seemingly incompatible elements of hybridity as simultaneously compatible and beneficial if individual actors are able to dynamically balance them. In a study of reinsurance traders at Lloyd's of London, who successfully aligned the seemingly incompatible needs of the insurance market and of the intra-organizational community at Lloyd's, Smets et al. (2015) show how individuals can keep and leverage competing logics by mechanisms of segmenting, bridging and demarcating. Their study shows that hybrid organizing not only implies challenges and conflicts for individual organizational actors but also reveals new opportunities for these individuals.

In the first paper of this thesis, I extend these micro-level insights and demonstrate how the power of hybridity, as embodied by the individual organizational actor, not only implies the possibility of positive and negative outcomes for the individual actors themselves but also how it can positively and negatively impact other individuals they work with.

1.1.2 Hybrid organizing on the meso-level

On the meso-level, hybridity and hybrid organizing concerns the organization itself as an institutional carrier of divergent forms, identities, or logics. This hybridity can exist for several reasons and the growing economic rationalization of several professions is one of them. For example, many hospitals and other healthcare organizations are confronted with the challenge of balancing the logics of comprehensive patient care with the logics of financial stability (Nigam & Ocasio, 2010; Reay & Hinings, 2009), which implies hybridization conflicts between the business identity and the identity of their medical profession (Pratt & Foreman, 2000).

To ensure organizational survival in an increasingly globalized and competitive market environment with limited public subsidization, the growing integration of an economic rationalization logic towards a hybrid rationale with overlapping institutions can also be observed among a range of other professions from various industries including education (Schiersmann, 2014; Teelken, 2015; Winter & Bolden, 2020), philanthropy (Hwang & Powell, 2009; Mair & Hehenberger, 2014), biotechnology (Murray, 2010), arts (Dalpiaz et al., 2016; Glynn & Lounsbury, 2005; Hsu et al., 2012), and craft (Kroezen et al., 2021). On the contrary, many organizations with a primarily economic logic are also becoming hybrids by adopting a community logic of higher social value creation in order to gain broader societal support and legitimacy (Almandoz, 2012; Battilana et al., 2012; Berti & Pitelis, 2021).

Besides the convergence of logics from organizational templates that are categorized as either predominantly economic-, profession- or community-oriented enterprises, there are numerous other reasons for hybridity at the organizational level. These include, for example, business mergers and transitions that bring different organizational identities and cultures together (Clark et al., 2010; Waring, 2015); an engagement in cross-sectoral partnerships that combine public and private demands (Dentoni et al., 2016; Selsky & Parker, 2005; Van Tulder et al., 2016); the spanning of institutional categories, such as science and technology in nanotechnology firms

(Wry et al., 2014); the combination of short-term and long-term organizational perspectives to respond to conflicting stakeholder demands (Ramus et al., 2020; Reypens et al., 2021a), or the selection of a hybrid legal structure that combines both a for-profit and non-profit entity (Battilana et al., 2012; Haigh et al., 2015; Tracey et al., 2011).

Whatever the reasons for organizational hybridity, it requires effective governance mechanisms to make it work and to gain legitimacy and support from organizational stakeholders (Denis et al., 2015; Schiersmann, 2014). Ideally, these governance mechanisms should accommodate the disparate forms, identities, or logics of the respective hybrid organization (Kraatz & Block, 2008). However, due to the underdevelopment of appropriate governance frameworks for organizational hybrids, many of these organizations engage in makeshift solutions that are underpinned by incumbent governance principles and imply a mismatch with their organizational requirements (Battilana et al., 2018; Mair et al., 2015). To address this issue, the second paper of this thesis explores an alternative governance framework for hybrid organizations that diverts from the incumbent bureaucratic governance logic towards a collegiality-oriented logic.

1.1.3 Hybrid organizing on the macro-level

On the macro-level, hybridity and hybrid organizing refers to pluralistic institutional dynamics within and across industries, markets, or regions. For example, an intra-industry case of macro-level hybridization is provided by Reay and Hinings (2005), who describe how the governmental introduction of healthcare reforms in Alberta has led to a radical hybridization of the healthcare system through which a physician-centered institutional logic became dominated by a new macro-level logic that was based on efficiency and effectiveness. An example for hybridization across industries, markets, or regions can be found in the work of Westney (1987, cited in Haveman & Rao, 2006: 974-975), who outlined the partial integration of Western organizational patterns by Japanese firms as a hybrid modernization strategy for the Japanese economy.

Macro-level hybridity can also exist in the form of hybrid public regimes that combine authoritarianism with democracy or plebiscitarianism (Brownlee, 2009). Such hybrid institutional dynamics at the macro-level can lead to further hybridization effects for the meso and micro-level, and vice versa, calling for a relational perspective

on hybrid organizing. Using the example of health care reforms, the combination of a medical logic with a dominating business logic at the macro-level enforced organizations to subordinate their medical identity to a business identity at the meso-level, e.g. by adopting a stronger profit orientation and by replacing patient-oriented physicians on organizational boards with more business-minded individuals (Reay & Hinings, 2005). This also requires individual members of the healthcare organization to cognitively re-orient their mental maps and the personal value systems of their medical profession (Currie & Spyridonidis, 2016; Pratt & Foreman, 2000; Reay & Hinings, 2005). However, the relationships between macro, meso, and micro-level hybridity are not one-directional but reciprocal. Organizational members can leverage their individual and collective agency to enact organizational and field-level change (Pratt & Foreman, 2000), e.g. by calling a strike or by campaigning against healthcare reforms (Reay & Hinings, 2005). In this regard, individual actors become 'institutional entrepreneurs' who change the status quo by transforming existing institutions or by creating new ones (DiMaggio, 1988). The third paper of this thesis provides an institutional nexus perspective that explores macro-level hybridity in connection with individual agency by focusing on different forms of context-spanning entrepreneurship and its potential for social change.

Although various kinds of hybridity have been studied extensively across a broad spectrum of organizations, organizational members, and organizational contexts, research is far from saturation in this field. A particular knowledge gap persists in terms of the degree, complexity, multiplicity, and performativity of hybrid organizing with an integration of different theoretical perspectives (Battilana et al., 2017). To advance research in this direction, the field of social entrepreneurship is regarded as the ideal setting since it represents hybrid identities, forms, and logics at the very core of the discipline (Battilana & Lee, 2014). Therefore, the three papers of this thesis explore different phenomena of pluralistic hybrid organizing in social entrepreneurship on a micro, meso, and macro-level where more than two identities, forms, or logics are combined.

1.2 Hybrid organizing in social entrepreneurship

Social entrepreneurship is defined as "the innovative use and combination of resources to pursue opportunities to catalyze social change and/or address social needs" (Mair & Marti, 2006: 37). It also represents a highly dynamic and fast-growing

stream of entrepreneurship research (Urbano et al., 2017). In contrast to traditional entrepreneurship that follows a predominantly economic rationale aiming at the utility maximization of the entrepreneur and their enterprise, social entrepreneurship goes beyond economic rationalization and individual returns (Haugh, 2006). It refers to a way of organizing that follows a primarily social rationale aiming at an increased welfare production for others (Miller et al., 2012), while economic returns play an ancillary, yet important and stabilizing role.

The common understanding of social entrepreneurship comprises not only work to address social issues, such as poverty and inequality, but also work on resolving environmental problems, such as forest degradation or water pollution (Dacin et al., 2011; Haugh, 2007a; Seelos & Mair, 2005a; Short et al., 2009). However, scholars have also developed more specific categories, such as 'ecopreneurship', 'green entrepreneurship', or 'environmental entrepreneurship', for primarily environmentally-oriented ventures (Gast et al., 2017; Hörisch et al., 2017; Meek et al., 2010; Pastakia, 1998; Schaltegger, 2002; York et al., 2016), as well as 'prosocial entrepreneurship' for particularly compassionate and altruistic forms of venturing that seek to alleviate the suffering of disadvantaged others (Mittermaier et al., 2021b; Peredo et al., 2018; Powell et al., 2018; Shepherd, 2015). In addition, researchers have also established more holistic research avenues, such as 'entrepreneurship for the public good' (Vedula et al., 2021), which seeks to integrate the social and environmental streams, or 'sustainable entrepreneurship', which considers triple-bottom-line initiatives that balance social, environmental, and economic dimensions (Belz & Binder, 2017; Cohen & Winn, 2007; Hockerts & Wüstenhagen, 2010; Johnson & Schaltegger, 2020; Muñoz & Cohen, 2018). Although these overlapping, yet distinguishable, research approaches are helpful to address specific entrepreneurial key questions (Thompson et al., 2011), social entrepreneurship has remained the dominant research domain for entrepreneurial efforts that seek to enact positive societal change through different forms of innovative business venturing.

Since social entrepreneurs must generate economic income in order to finance their social and/or environmental ideals, this form of venturing also implies organizational hybridity at the micro, meso, and macro-level. Consequently, the field of social entrepreneurship not only represents a cornucopia of research opportunities

to advance the theoretical knowledge on hybrid organizing but also a practical tool through which a capitalist system can be leveraged or even transformed to create social innovations and societal change.

1.2.1 The social entrepreneur as a hybrid change agent

The micro-level of social entrepreneurship concerns the social entrepreneur as an innovative change agent with a distinct social identity configuration. This identity is formed through a combination of personal attributes and the social entrepreneur's interpersonal interactions in the socio-cultural systems of society (Pan et al., 2019). As the work of Fauchart and Gruber (2011) suggests, entrepreneurs generally belong to one of three fundamental identity types: (1) 'Darwinians' who are driven by competition and economic self-interest; (2) 'Communitarians' who strive to serve their fellow community members; and (3) 'Missionaries' who seek to support the broader society. These three identities can be further distinguished into self-oriented and other-oriented entrepreneurs. However, in the case of social entrepreneurs, scholars have been reluctant to embrace the view that these entrepreneurs belong to either one of such identity types, but rather embody a hybrid identity that is both self-oriented as well as other-oriented (Cesinger et al., 2021; Gruber & MacMillan, 2017; Wry & York, 2017; Żur, 2021). Notably, significant variations exist within the magnitude of this hybridity. Social entrepreneurs with a prosocial propensity, for example, are inclined to predominantly focus on increasing the welfare of others while they risk neglecting their own economic stability (Bacq & Alt, 2018; McMullen & Bergman Jr, 2017). Such imbalances can create significant identity conflicts for them (York et al., 2016). However, individual-level hybridity can also exist in many other forms (e.g., in terms of gender, race, or nationality) that can create further complexity and tensions for the work of social entrepreneurs.

In the first paper of this thesis, I address the pluralistic hybridity of social entrepreneurs by introducing and systematically examining the phenomenon of prosocial power in the context of transnational social entrepreneurs (TSEs). These 'amphibious entrepreneurs' (Powell & Sandholtz, 2012) are a sub-category of migrant entrepreneurs (Sequeira et al., 2009) who leverage a hybrid social embeddedness in two or more geographical environments (Drori et al., 2009) in order to create a positive social impact for others (Bolzani et al., 2020). I compare three different groups of TSEs who exert their prosocial entrepreneurial capacity and hybrid national

embeddedness to alleviate the suffering of indigenous peoples in rural Ecuador. The first group consists of Foreign TSEs who migrated to Ecuador and established social enterprises that work with disadvantaged indigenous communities. The second group is comprised of Domestic TSEs of Ecuadorian, but non-indigenous, origin, who returned to Ecuador after spending significant time abroad. The third group is represented by Indigenous TSEs who are from indigenous Ecuadorian communities themselves and returned to their home country after living abroad. I studied this diverse set of entrepreneurial actors by employing a qualitative multiple case study approach that includes a total of 12 TSE cases. The Latin American context is important as it represents one of the world's most inequitable regions with unique empirical conditions to investigate social entrepreneurship phenomena in relation to vulnerable populations (Aguinis et al., 2020). In this regard, I put a particular focus on Ecuador as one of the world's seventeen ecologically megadiverse countries that is highly underrepresented in contemporary management research (Ronda-Pupo, 2016) and which represents a context where indigenous peoples continue to suffer from high levels of poverty and inequality.

The three groups of TSEs were compared based on their distinct social configurations to determine how prosocial power is embodied by prosocially motivated entrepreneurs as well as why and how it can function as a double-edged sword for negative as well as positive prosocial impact, despite good intentions. I develop a dynamic model showing that the orchestration of four critical characteristics - social distance, bi-directional learning, reflexive impact measurement, and socio-spatial dominance - plays a decisive role in whether or not social entrepreneurs can make a positive prosocial impact on disadvantaged others. In short, I highlight the importance of carefully engaging in prosocial entrepreneurial interactions to avoid asymmetrical power relations between high-capacity social entrepreneurs and their comparatively less powerful beneficiaries.

The theoretical contributions of the first paper address the lack of research regarding the bright and the dark sides of prosocial organizing (Bolino & Grant, 2016; Moroz et al., 2018; Wry & Haugh, 2018). I show how power relates to place and engage in a critical theorization of multi-contextual embeddedness (Baker & Welter, 2018), further addressing the lack of research on the power implications of diverse socio-spatial contexts for entrepreneurial practices (Welter, 2011). In particular, I

theorize about the concept of prosocial power as a hybrid force in vulnerable socio-spatial contexts consisting of disadvantaged and underprivileged individuals. The framework highlights the potential of prosocial power as a positive force for the alleviation of the suffering of disadvantaged others. I argue that prosocial power can lubricate the levers of social entrepreneurship by providing an important source of external knowledge and resources, while it can also lead to social imbalances, communication breakdowns, and unsustainable practices that develop dependencies, animosities, and confusion. By showing how prosocial power differs between TSEs of foreign, domestic non-indigenous, and indigenous origin, I also address the lack of contextual comparison among transnational entrepreneurs (Terjesen et al., 2016).

The study is unique in systematically examining the hybridity of prosocial power in the practices of well-meaning social entrepreneurs with a hybrid national embeddedness who operate in vulnerable socio-spatial contexts. It provides important insight and propositions for scholars interested in studying these activities on a micro-level, practitioners who wish to maximize their prosocial impact, and policymakers who seek to solve persistent social problems.

1.2.2 The social enterprise as a hybrid organization

Apart from studying hybridity at the individual level of the social entrepreneur, the organizational level also provides an attractive and important research setting to advance the knowledge on hybrid organizing. In the context of social entrepreneurship, this concerns the social enterprise as the focal unit of analysis.

Social enterprises are ‘extreme cases’ of hybrid organizations (Battilana & Lee, 2014) because they are confronted with the ambitious challenge of integrating social welfare creation and economic performance in a dual mission (Doherty et al., 2014; Hoffman et al., 2012). These two organizational aims were traditionally considered incompatible or even risky to combine as they imply conflicting institutional logics (Chliova et al., 2020; Galaskiewicz & Barringer, 2012) and a hybrid organizational identity (Moss et al., 2011). Since dedicated hybrid organizational frameworks were mostly absent until the millennium (Low, 2006), profit maximization has remained the dominant institutional logic underpinning the capitalist system. However, the aftermaths of severe economic and environmental crises of the 21st century have left many societal actors disillusioned with the promises of modern

capitalism and led to a growth in social enterprises that pursue the hybrid ideal of joint social and economic value creation (Battilana et al., 2012; Doherty et al., 2014). These enterprises also demonstrate that it is possible to blend and leverage divergent and conflicting institutional elements (Chliova et al., 2020; Pache & Santos, 2013; Ramus et al., 2017; Smith & Besharov, 2019) and have become a legitimate organizational blueprint for postmodern society.

Considering the significant contribution that social enterprises can make towards alleviating complex social and environmental problems, their way of hybrid organizing has even prompted a theoretical discussion about whether or not every new organization should be required to become a social enterprise (McMullen & Warnick, 2016). But also empirically, a progressive convergence towards the social enterprise model can be observed among a growing number of entities across the organizational landscape (Battilana et al., 2012). On one hand, traditional non-profit organizations increasingly turn to active commercial revenue generation to sustain their social mission more effectively by compensating for insufficient donations and diminishing public support (Chliova et al., 2020; Litrico & Besharov, 2019; McKay et al., 2015). On the other hand, a growing number of traditional for-profit corporations see their social and environmental responsibility lying in the integration of charitable and community service programs aimed at achieving organizational legitimacy in line with changing societal expectations (Nicholls, 2010; Pache & Santos, 2013). Thus, today's social enterprises seem to represent the prototype of a new business generation that strives for collective societal betterment instead of individual economic returns.

Despite the high hopes and promises bound up with social enterprises, a major challenge for their survival is the difficulty in maintaining a balanced organizational hybridity between their social and economic identity. Ideally, a common organizational identity can be created that integrates the different logics the organization combines and prevents the emergence of subgroup identities that may reinforce logic tension (Battilana & Dorado, 2010). However, the formation of such a hybrid identity can be a difficult, dynamic, and lengthy process for social enterprises (Cornelissen et al., 2021), and it requires a number of strategic conditions to get social and economic missions to work in tandem (Muñoz & Kimmitt, 2019). To master the balancing act, many scholars have pointed to the critical role of social enterprise

governance as an essential criterion (Battilana et al., 2015; Bruneel et al., 2016; Cornforth, 2020; Ebrahim et al., 2014; Kennedy et al., 2020; Mair et al., 2015; Mair et al., 2020; Mason & Doherty, 2016; Spear et al., 2009; Wolf & Mair, 2019).

Organizational governance generally encompasses “the structures, systems and processes concerned with ensuring the overall direction, control and accountability of an organization” (Cornforth, 2020: 224). Without appropriate governance mechanisms, social enterprises are consequently at risk of losing their hybrid balance and experience a ‘mission drift’ away from their core organizational mission (Ebrahim et al., 2014; Santos et al., 2015). Although the phenomenon of mission drift comes in many varieties (Grimes et al., 2019), for social enterprises it is commonly associated with a detrimental overemphasis on commercial logics at the expense of the organization’s original social purpose (Battilana et al., 2012; Kwong et al., 2017; Ramus & Vaccaro, 2017). However, a drift towards an overemphasis on social logics can be equally harmful as it threatens to financially sustain the social enterprise and its ability to create social value over time (Cornforth, 2014; Young et al., 2012). In this sense, the role of organizational governance turns towards “equilibrating mechanisms that must coordinate and balance efforts to uphold existing organizational values while also responding to challenges associated with values-based complexity in and around those organizations” (Grimes et al., 2019: 821).

In recent years, scholars and practitioners have started to address the specific governance challenges emerging from the hybrid nature of social enterprises. This has resulted, for example, in the creation of dedicated legal structures and accreditations giving a public identity to social enterprises as well as greater legitimacy to their stakeholders (Cornforth, 2020; Moroz et al., 2018; Murray & Hwang, 2011). Additionally, important novel insights and strategies have been generated in terms of internal management processes (Battilana et al., 2015; Pache & Santos, 2010; Wolf & Mair, 2019), board structure and composition (Bruneel et al., 2020; Ebrahim et al., 2014; Low, 2006; Mason & Doherty, 2016; Santos et al., 2015), and stakeholder involvement (Bacq & Aguilera, 2022; Huybrechts et al., 2014; Ramus & Vaccaro, 2017). However, researchers have also highlighted that social enterprises still require alternative intra-organizational governance mechanisms that deviate from the dominant but incompatible bureaucratic macro-logic of economic efficiency and hierarchy that underpins the capitalist system (Battilana et al., 2018; Mair et al., 2015).

In the second paper of this thesis, I suggest and discuss the Weberian concept of collegiality as a potential alternative for the intra-organizational governance of social enterprises. Besides democracy, Max Weber (1968) elaborated on collegiality as a major political governance concept that follows a polycratic logic “in which power is divided among the members on a theoretically egalitarian basis” (Waters, 1993: 56). In comparison to democracy, which has attracted considerable attention from organizational theorists in recent years (e.g. Audretsch & Moog, 2020; Battilana et al., 2018; Courpasson & Dany, 2003; Harrison & Freeman, 2004; Hielscher et al., 2014; Johnson, 2006; Kerr, 2004; Lee & Romano, 2013), research on collegiality is still in its infancy (Denis et al., 2019; Lazega, 2001, 2020). This is especially the case for the field of social entrepreneurship and hybrid organizing. However, since collegiality stands in sharp contrast to bureaucracy, I argue that collegiality research has great potential to yield new insights for the advancement of social enterprise governance and hybrid organizing.

The paper takes an institutional logics perspective as a highly influential research domain (Lounsbury & Beckman, 2015; Lounsbury & Wang, 2020; Thornton et al., 2012) and connects it back to the work of Max Weber, whose insights remain very valuable for research on intra-organizational phenomena (Lammers, 1981; Lounsbury & Carberry, 2005). The paper draws on empirical evidence from two social enterprises – one from the Global North and the other from the Global South - that adopted a collegiality concept for their intra-organizational governance. While one organization continues to thrive with its collegiality concept, the other one failed. In the analysis of the two cases, I identified which collegiality elements are particularly supportive for an application of collegiality in a hybrid organizational context as well as which elements should be modified and combined with a bureaucratic logic in order to be most effective.

The paper contributes to a better understanding of hybrid organizing on a meso-level in three important ways. First, it advances the emergent literature on hybrid enterprise governance by theorizing on a re-enchantment of collegiality as a previously marginalized polycratic governance approach. Second, it makes novel use of the collegiality concept by exploring the applicability of its major elements in the context of social enterprises. Third, it provides empirical insights for the advancement

of the institutional logics perspective in line with four analytical dimensions proposed by Gümüsay et al. (2020).

1.2.3 Social entrepreneurship as a contextual hybridization

At the macro-level, social entrepreneurship deals with extra-organizational hybridity that concerns communal, industrial, national, or supranational phenomena, processes, and systems for social welfare creation (Lumpkin et al., 2018; Shepherd et al., 2020). For example, the evolution of supportive ecosystems for social entrepreneurship involves hybridization of historical, political, legal, cultural, and economic factors (Roy & Hazenberg, 2019), while the effective delivery of social services and social innovations to society often requires collaborative actions between various stakeholders from the public and private sectors (Chandra et al., 2021; Lumpkin & Bacq, 2019; Osborne & Brown, 2005). Furthermore, social entrepreneurship frequently goes beyond the support of local communities and spans different geographical contexts. This involves the internationalization of social enterprises that expand their hybrid model from one national context to another (Angulo-Ruiz et al., 2020; Yang & Wu, 2015; Zahra et al., 2014a; Zahra et al., 2008) as well as the transnational entrepreneurial bridging of two or more contextual environments in which social entrepreneurs are socio-culturally embedded (Bolzani et al., 2020). Since macro-level institutional complexity significantly influences how social entrepreneurship can evolve in a certain context (Estrin et al., 2013; Muñoz & Kibler, 2016; Pache & Chowdhury, 2012), operations in different geographical contexts imply the presence of multiple sets of institutional arrangements as facilitating and constraining factors for social entrepreneurs. Cross-cultural experiences, for example, are intrinsically paradoxical and often underpin the hybridity tensions in social entrepreneurship ventures (Mafico et al., 2021). However, the contextual implications of social entrepreneurship are often generalized in contemporary research and insufficiently consider the differences in the various environments where social entrepreneurship takes place (Ault, 2016).

In the third paper of this thesis, I continue to surf on new waves in the rising tide of contextualized entrepreneurship research (Welter et al., 2019) and contribute to scholarship that is concerned with comparative entrepreneurship processes across national contexts (Baker et al., 2005). In particular, I address the growing phenomenon of transnational migrant entrepreneurship and discuss why and how

different migration directions and human capital endowments form important institutional boundary conditions for entrepreneurial practices. The conceptual paper applies institutional theory and introduces an institutional nexus perspective that links the institutional support and institutional void perspectives on social entrepreneurship for a better understanding of hybrid organizing at the macro-level (Stephan et al., 2015). The institutional support perspective states that social entrepreneurship is most effective in national contexts with strong institutions, since such contexts can provide entrepreneurial actors with the resources, services, and political stability needed to develop a thriving enterprise (Chen et al., 2018; Estrin et al., 2013; Stephan et al., 2015). In contrast, the institutional void perspective contends that social entrepreneurship flourishes in contexts with rather weak institutions (Dacin et al., 2010; Haugh, 2005), because many social entrepreneurs are attracted by disadvantaged contexts where they can make a real difference in the lives of the most vulnerable populations who have insufficient access to supportive institutions (Austin et al., 2006; Santos, 2012; Seelos & Mair, 2005a; Zahra et al., 2009). However, while local social entrepreneurs from institutional void environments often face significant difficulties in overcoming the barriers of their surrounding context (Ault & Spicer, 2009; Mair et al., 2012), foreign social entrepreneurs frequently struggle or fail to adapt their social entrepreneurship concepts to the sociocultural circumstances of those disadvantaged others they seek to serve (Claus et al., 2021; Shantz et al., 2018). This points to the potential advantage of transnational social entrepreneurs who benefit from a hybrid social embeddedness in different institutional contexts that they can bridge to overcome institutional voids in one context with supportive institutional levers in another context. However, since previous research on transnational entrepreneurship has derived its insights almost entirely from studies of transnational migrant and returnee entrepreneurs who moved from developing countries to developed countries, other migration directions remain largely underexplored and undertheorized. Therefore, this paper develops a contextualized framework of transnational social entrepreneurship processes under consideration of bottom-up, top-down, cross-top and cross-bottom migration directions. Additionally, it puts these migration directions in combination with either high or low human capital levels that exist among transnational social entrepreneurs in both institutional void and support contexts to theorize more comprehensively on their potential as institutional bridging agents for social change.

The paper expands the emergent knowledge base about the hybrid concept of transnational social entrepreneurship (Bolzani et al., 2020). On the transnational entrepreneurship side, the paper contributes to the limited understanding of the diversity among transnational entrepreneurs (Terjesen & Elam, 2009) and the implications of different migration directions in particular. Moreover, it sheds new light on the critical role of human capital endowments for transnational entrepreneurs who operate in different geographical contexts (Terjesen et al., 2016). The research is important as it enhances our understanding of whether some multi-contextually embedded entrepreneurs are better able than others to alleviate the suffering of the disadvantaged.

1.3 A relational perspective on hybrid organizing

While each of the three papers outlined above predominately contributes to hybrid organizing on either the micro, meso, and macro-level, the Bourdieusian theory of practice (Bourdieu, 1977, 1998) is applied to tie the three papers together. The objective is to provide a relational perspective on hybrid organizing that brings the complex and dynamic interrelations between agents and structures to the fore in order to derive new implications for social entrepreneurship as a tool for social change. The theory of practice, with its major thinking tools of field, capital, and habitus, was chosen because it embraces an essentially relational logic of analysis. As highlighted by Tatli et al. (2014: 616) the use of Bourdieu's theory as "the relational link between agency and structure, and subjective and objective domains of social reality provides a basis for theoretical, methodological, and empirical innovation in entrepreneurship research". Furthermore, the work of Pierre Bourdieu was considered particularly apt to connect the different theories used in the three papers of this thesis for three major reasons. First, his grand theory was significantly influenced by the writings of Max Weber, which underpin the theorizations in the second paper of this work. Second, Bourdieu's own scholarship parallels large strands of institutional work which also permeates paper two and paper three of this thesis. Third, Bourdieu's theoretical framework is principally based on the study of societal power dynamics, which parallels the theorization in the first paper of this thesis.

The work of Bourdieu has already informed the research of several organizational theorists and entrepreneurship scholars. However, some researchers have also bemoaned the strong and unreasonable tendency of scholarship to

selectively extract one or two of Bourdieu's three key concepts of field, capital, and habitus from the holistic theory of practice framework instead of integrating them in a comprehensive and coherent manner (Dobbin, 2008; Swartz, 2008; Vaughan, 2008). Although some exceptions exist (e.g. Emirbayer & Johnson, 2008; Patel & Conklin, 2009; Spigel, 2013; Terjesen & Elam, 2009), the selective detachment of Bourdieu's primary thinking tools prevents the development of a relational understanding of empirical phenomena and the observation of the bigger picture. To leverage the tremendous value that a more comprehensive application of the theory of practice implies, this thesis integrates all three of Bourdieu's major thinking tools of field, capital, and habitus, while it also touches on some of his secondary theoretical concepts in the exploration of hybrid organizing in social entrepreneurship.

Although Bourdieu utilized countless empirical cases from various societal spheres to craft his theory, some 'fields' have received considerably less attention than others. While he elaborates extensively on relational interactions between micro and macro-levels (i.e. between individual agency and the broader social structure), he is comparatively silent on the meso-level that relates to inter and intra-organizational phenomena (Dobbin, 2008; Emirbayer & Johnson, 2008; Kerr & Robinson, 2009; Townley, 2014). Especially through the discussion of the second paper of this thesis, I contribute to the closure of this gap by providing a Bourdieusian interpretation of intra-organizational governance dynamics. Another contribution of the thesis relates to the Bourdieusian characterization of power as a source of domination and symbolic violence. Through the first paper of this thesis, I expand this view and elaborate on prosocial power as a double-edged sword whose strikes can lead to both positive and negative prosocial impacts.

I proceed as follows. First, I outline the broader methodology that underpins this thesis as a whole, including its ontological assumptions and epistemological approaches. Second, three individual papers, as outlined above, are provided that form the key pillars of this thesis. Third, I discuss the implications of the three papers through a Bourdieusian lens and craft a relational perspective on hybrid organizing that integrates the micro, meso, and macro-level contexts of social entrepreneurship. Finally, I outline the limitations of my work, provide suggestions for future research, and conclude with a brief reflection on this thesis.

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2 Methodology

This chapter outlines the specific procedures that led to the identification and development of a relational perspective on hybrid organizing across the macro, meso, and micro-levels. It starts with the research philosophy from which the methodology is derived, explains the theory of practice framework that unites the three individual papers of this work, and summarizes the research methods which are further detailed in each of the three papers.

2.1 The philosophical underpinnings

Since every methodology is embedded in the beliefs and assumptions of the researcher about the nature of reality (ontology), the theory of knowledge (epistemology), and the role of values within the research process (axiology), this section outlines the philosophical underpinnings that guided this thesis.

In the social sciences, the research philosophy can itself be regarded as a hybrid phenomenon that encompasses a multiplicity of paradigms or worldviews at two opposing extremes. These bidirectional extremes are commonly known as objectivism and subjectivism (Burrell & Morgan, 1979), and each can be seen as representing a much broader spectrum of research philosophies. Due to their significant influence on the various research methods that scholars must choose from to conduct a particular study, the presence of different worldviews, which are often perceived as incommensurable, continues to drive a long-running paradigm war among researchers (Shepherd & Challenger, 2013). For the strands of business and management research, including entrepreneurship, common philosophical perspectives are positivism, critical realism, structuralism, interpretivism, constructivism, postmodernism, and pragmatism. Notably, each of these stances can be further distinguished into more fine-grained worldviews and approaches to human inquiry. For constructionism and interpretivism, for example, which are already widely seen as two very similar, yet distinct philosophical approaches, further specific perspectives have developed over time such as radical constructivism, social constructivism, or structuralist constructivism, while there are also different phenomenological and hermeneutical approaches to interpretivism. Since the lines between the different philosophical stances are blurry, and because “their particular meanings are shaped by the intent of their users”, they can arguably be conceived as

a philosophical compass for the general research direction, rather than accurate descriptors for the nature of reality and knowledge (Schwandt, 1994: 221). This thesis also regards the two extremes of objectivism and subjectivism merely as two major flanks of a philosophical continuum and rejects the dualistic notion that a sharp line must be drawn between the two.

As outlined by Saunders et al. (2016), the objectivist dimension is based on realist ontological assumptions of the natural sciences in which only one single reality exists independently of social actors. In this sense, “the social world external to individual cognition is a real world made up of hard tangible and relatively immutable structures” that individuals are born into instead of being something they create by themselves (Burrell & Morgan, 1979: 4). For example, in his influential book titled *The Savage Mind*, the French anthropologist and ethnologist Claude Lévi-Strauss proposed a theory of culture in which cultural practices are seen as principally innate and determined by external structural rules. He theorizes the structures of the human mind to be the same for everyone and everywhere in world. Following the objectivist ontological positioning, the epistemological discovery of knowledge from this standpoint would then require a value-free research process and the objectification of the researcher from the object of study to derive law-like generalizations from observable facts about social behaviors and structures (Guba & Lincoln, 1994). This predominantly involves the application of quantitative research methods that deductively draw conclusions from logical and statistical observations and measurements to test theory.

As opposed to the objectivist paradigm, the subjectivist worldview is based on nominalist ontological assumptions from the arts and humanities and rejects the objectivist beliefs in the ‘real’ structures that are assumed to exist in the social world (Saunders et al., 2016). Instead, it postulates that the social world is humanly constructed and modified through the subjective experiences, interactions, and interpretations of individuals, which also implies the existence of a different, and constantly changing reality for every individual (Burrell & Morgan, 1979). In other words, it assumes the existence of multiple realities. Epistemologically, subjectivists seek to discover the truth by trying to get as deep inside of a particular socio-cultural context and as close to different individual experiences as possible, while they regard an axiological detachment from their own personal values as impossible (Saunders

et al., 2016). Therefore, a subjectivist position tends to discover new knowledge rather through the application of qualitative methods of inquiry that predominantly involve an inductive way of theory development by interpreting the individual meanings, thoughts, and feelings of the research participants.

For the philosophical positioning of this thesis, it is important to note that it explores the phenomenon of hybrid organizing in different social contexts and among different social actors. It conceives hybrid organizing as a product of social interaction for which no single reality exists. Different forms of hybrid organizing are assumed to be created and differently experienced by different individuals who attach different meanings to it. Consequently, hybrid organizing is believed to be in a constant state of flux. As outlined in the introduction section of this work, the long-held ontological belief that depicts hybridity as a source of undesirable institutional complexity in an organizational context and therefore ought to be resolved has already been shaped by researchers who also showcased the beneficial aspects of hybridity and who promote its existence. Based on the above, I assume hybrid organizing to have multiple realities and meanings. I do not regard it as an objective entity that is similar to all individuals or organizations. Nor do I consider it feasible to axiologically study phenomena of hybrid organizing in the same way as physical entities and in a completely value-free manner. Finding answers to the questions I am asking in this thesis would have been regarded as unfeasible if I had merely taken the etic, outsider position of an objective observer. Instead, it required me to take an emic, socially immersive approach with significant personal interaction in different socio-cultural contexts. Due to these perceptions, the philosophical stance of this thesis appears to be predominantly located in the subjectivist spectrum of the philosophical continuum. However, contrary to a purely subjectivist position, this thesis does not reject the existence of an objective socio-historical context from which the social construction of hybrid organizing emerges. Instead, it follows a relational perspective that bridges the entrenched objective-subjective divide that continues to traverse entrepreneurship and management research (Tatli et al., 2014). In particular, it embraces the relational philosophical approach of the French sociologist Pierre Bourdieu who alternatingly described his approach as ‘structuralist constructivism’ and ‘constructivist structuralism’ (Bourdieu, 1989), “to stress the dialectical articulation of the two moments (objectivist and subjectivist) of his theory” (Wacquant, 1992: 11).

Pierre Bourdieu was one of the most influential social scientists of the 20th century. While he was trained as a philosopher, and active as an anthropologist and public intellectual, his most important intellectual contributions arose from his devotion to the discipline of sociology. What he saw as most essential in his prolific work is the primacy that he gives to the relations that he assumes to exist between the objective structures of the social world and the individual actions of the social actors within it (Bourdieu, 1998). This relational perspective evolved from his steadfast intention to overcome the artificial and antagonistic divide between objectivism and subjectivism (Bourdieu, 1977, 1989), which he saw as 'most ruinous' for the social sciences because "the modes of knowledge which it distinguishes are equally indispensable to a science of the social world that cannot be reduced either to a social phenomenology or to a social physics" (Bourdieu, 1990b: 25). Bourdieu's perspective was formed through his own empirical investigations and experiences and draws on the work of several other influential thinkers who shaped the social sciences and who represent several different paradigms from the philosophical universe. These thinkers include, for example, Karl Marx and Emile Durkheim, whom Bourdieu identified as most consistent in their objectivist expressions, and Alfred Schutz whose work is seen by Bourdieu as one of the purest expressions of subjectivism (Bourdieu, 1989). Between these two opposing positions of the ontological spectrum, Bourdieu also shaped his perspective through the critical engagement with the works of other renowned writers such as Ernst Cassirer, Gaston Bachelard, Ludwig Wittgenstein, Blaise Pascal, Edmund Husserl, Martin Heidegger, Max Weber, Maurice Merleau-Ponty, and Jean-Paul Sartre, to name only some of the most influential ones (Grenfell, 2012). The methodological result that emanated from Bourdieu's relational analyses is his seminal 'theory of practice' (Bourdieu, 1977, 1998), which this thesis applies as an overarching research framework to develop a relational perspective on hybrid organizing.

2.2 A theory of practice approach

The Bourdieusian theory of practice has its foundations in Bourdieu's observations of indigenous societies in Algeria, the Kabyle Berbers from the Algerian highlands, who suffered from the arrival of external Western actors (Bourdieu, 1979). Coincidentally, the starting point was very similar for this thesis, which also evolved from observations in indigenous spaces that struggled with the arrival of Western outsiders. However,

Bourdieu's grand theory was essentially chosen since it provides a strong framework for the exploration of phenomena where interpersonal dynamics and actor-context relations are focal (Dobbin, 2008; Emirbayer & Johnson, 2008), and where institutional dualities exist (Mohr, 2013). In research within the multifaceted domain of entrepreneurship, the theory of practice has found moderate, yet insufficient application to unearth new knowledge. This also includes the particular fields of transnational entrepreneurship (Al Ariss & Syed, 2011; Drori et al., 2009; Patel & Conklin, 2009; Patel & Terjesen, 2011; Terjesen & Elam, 2009) as well as social entrepreneurship (De Clercq & Honig, 2011; Lehner, 2014; Nicolopoulou, 2014), which mark two important pillars of this thesis. Most contributions to the literature have selectively employed only certain parts of Bourdieu's theoretical body, either purposefully to shed new light on particular aspects of entrepreneurial organizing or simply because the word limit for most journal articles often does not provide enough space for more holistic elaborations. Moreover, since Bourdieu's work itself shows only little engagement with the organizational level, it comes as no surprise that his theory remains highly underrepresented on this level (Emirbayer & Johnson, 2008; Townley, 2014), which implies further considerable research opportunities that this thesis seeks to address.

The theory of practice consists of three major inter-dependent and co-constructed theoretical building blocks that Bourdieu referred to as *field*, *capital*, and *habitus.* These three elements represent the main regularities of the practice outcomes of both individual and organizational social actors in relation to the different social contexts in which they operate. In this sense, they also represent three essential thinking tools for a relational understanding of the practice of hybrid organizing. However, due to their relational nature, Bourdieu emphasized that none of the tools is meant to be used in isolation to study empirical phenomena (Bourdieu & Wacquant, 1992) – a notion that is often neglected in the praxis of entrepreneurship and wider management research.

The notion of *field* refers to a circumscribed social space in which interactions, inclusive of the power struggles of social actors, take place (Bourdieu, 2005; Bourdieu & Passeron, 1990). It provides the objective structural boundaries for what can be done within a specific social context and the positions that social actors can obtain in it. Bourdieu exemplifies this with the imagination of a battlefield or a playing field

(Bourdieu & Wacquant, 1992). What the players are able to do on a football field, for example, is influenced by the physical field conditions, the spatial field size, the rules that either pre-exist or that the players negotiate for the game, and the field positions that the players occupy (Thomson, 2012). However, the social world consists of numerous fields as hierarchically organized microcosms in which social actors are simultaneously involved and where existing power relations structure their human behavior. Bourdieu elaborates in this sense on the existence of an overall field of power that is controlled by the most dominant group of actors (Bourdieu, 1998) and which consists of multiple semi-autonomous fields and dependent subfields (Bourdieu, 1990a, 1996). Entrepreneurship, for example, is one of many constantly developing academic fields in the social sciences, each with its own field logic and several dependent subfields.

In Bourdieu's theory, social actors also develop a *habitus,* which he defines as "systems of durable, transposable dispositions, structured structures predisposed to function as structuring structures" (Bourdieu, 1990b: 53). In other words, his concept of habitus refers to the past and present experiences of social actors that influence their present and future agentic actions through a mechanism that connects the objective social structure with subjective personal experiences (Maton, 2012). The habitus represents an important precondition for the power of social actors and a compass that guides them to function within a particular field. As such, it provides a "practical sense for what is to be done in a given situation" (Bourdieu, 1998: 25), even though it might not be the best way to do it. However, due to the continuous accumulation of new life experiences, an individual's habitus is never constant but "endlessly transformed" (Bourdieu, 1990a, 2000) and therefore open to learning. Furthermore, there is not a single habitus but a dichotomy of not immutable habitus in which Bourdieu (1990b, 2000) distinguishes between a *primary or basic habitus* and a *specific habitus*. While the former carries a 'disproportionate weight' and is constructed by the experiences from an individual's upbringing and early socialization processes in particular fields, the latter is made up of a social actor's later life experiences in other fields (Bourdieu, 1990b).

Capital represents the third element of Bourdieu's theory, which he described as "the set of actually usable resources and powers" (Bourdieu, 1984: 114). As such, the term goes beyond the Marxist, monetary association of capital but encompasses

various material and immaterial forms occurring within a system in which they can be converted from economic to cultural or social forms and back, and represented in symbolic forms (Bourdieu, 1986). In this regard, *social capital* refers, e.g., to social affiliations, family, and cultural heritage. It encompasses the actual or potential resources embedded in durable interpersonal networks. *Cultural capital* represents a social actor's accumulated knowledge and behaviors and includes, e.g., education, taste, aesthetic and cultural preferences, and language, while *economic capital* encompasses financial assets and property. Capital can furthermore exist in different states, including an objectified state (material representation), an embodied state (incorporated field principles), or as a habitus (dispositions and attitudes) that expresses itself as *symbolic capital* (Bourdieu, 1986). Essentially, it is through the exercise of material and immaterial forms of capital that social actors can obtain power, dominance, status, and legitimacy within a field, or even shape the field itself (Bourdieu, 1985, 1986). As field processes are essentially about 'who gets what' (Fligstein & McAdam, 2011), both more and less powerful field participants constantly vie for different forms of capital in order to improve their position within a field. The exercise of capital in given fields can consequently function "both as weapons and as stakes" (Emirbayer & Williams, 2005: 691) in the battle of field positions.

In the field of entrepreneurship, this thesis focuses particularly on the subfield of social entrepreneurship, while each paper of the thesis engages with specific empirical fields in which the power struggles related to different forms of hybrid organizing are addressed. However, since each of the three papers in this thesis uses a different theoretical framework, it is not until the discussion section that Bourdieu's theory of practice framework is applied to link the three papers in a relational manner.

2.3 Methods

This section gives an initial overview of the research methods applied in this thesis, while a more context-specific description is provided in each of the enclosed papers. Among the three individual papers of this thesis, the first and the second paper are empirical papers that apply a qualitative research design. Both make use of multiple case studies as a research strategy through which the phenomena under study are explored in their real-life context to create new knowledge and to develop new theory (Dubois & Gadde, 2002; Eisenhardt, 1989; Eisenhardt & Graebner, 2007; Yin, 2014). In contrast, the third paper of this thesis is a conceptual paper that uses a proposition-

based style of theorizing (Cornelissen, 2017) and outlines a novel theoretical perspective on the extant conceptualization of transnational entrepreneurship as well as the macro-institutional underpinnings of social entrepreneurship.

The papers are generally driven by abductive reasoning as a relational approach between induction and deduction (Dubois & Gadde, 2002; Suddaby, 2006) that is driven by the engine of 'doubt' and the suggestion that something *may be* (Locke et al., 2008). This approach "involves the forming of a 'hunch' or explanatory hypothesis to make sense of puzzling facts" (Kistruck & Slade Shantz, 2021: 3). For example, paper one addresses doubt in the widespread belief that prosocial organizing has a positive prosocial impact and suggests that the prosocial power of transnational social entrepreneurs may be a double-edged sword for positive and negative social impact. Paper two addresses doubt in the widespread belief that democracy could be a viable alternative to bureaucracy in hybrid enterprise governance and suggests that collegiality may be a better alternative. Finally, paper three addresses doubt in the widespread belief that social entrepreneurship works best in either an institutional support context or an institutional void context and suggests that institutional bridging agents like the multi-contextually embedded transnational social entrepreneurs may be even better positioned, depending on their migration directions.

Except for the third, conceptual paper, the methods of inquiry in this thesis essentially follow a grounded theory approach in which new theory is constructed from the qualitative data of contextualized social phenomena. Although the grounded theory approach "is usually referred to as taking an inductive approach […], it may be more appropriate to think of it as abductive, moving between induction and deduction" (Saunders et al., 2016: 193) to systematically collect and analyze the data. The respective processes of context and sample selection, data collection, and data analysis are detailed in the two empirical papers that follow below.

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3 The prosocial power of transnational social entrepreneurs (Paper 1)

3.1 Abstract

Social entrepreneurs can be powerful change agents for alleviating the suffering of the disadvantaged. However, their prosocial motivation and behavior frequently result in detrimental impacts on those they intend to support, especially when their operations span different socio-spatial contexts. I conducted a multiple comparative case study among 12 transnational social entrepreneurs of foreign, domestic non-indigenous, and local indigenous origin, who are seeking to improve the livelihoods of indigenous communities in rural Ecuador. I introduce the concept of prosocial power to social entrepreneurship research and demonstrate how it can work as a double-edged sword in the hands of transnationally embedded social entrepreneurs who operate in vulnerable places. Context-bound variations in social distance, bi-directional learning, reflexive impact measurement, and socio-spatial dominance were identified as being decisive for prosocial power to lead to positive or negative impacts on disadvantaged others.

3.2 Introduction

Prosocial organizing refers to “positive social acts carried out to produce and maintain the well-being and integrity of others” (Brief & Motowidlo, 1986: 710). It represents a particularly important yet under-studied domain of research on entrepreneurship aimed at alleviating the suffering of others (Shepherd, 2015). Notably, social entrepreneurship research has already become a dominant stream incorporating prosocial organizing (Wry & Haugh, 2018), focusing on compassionate social entrepreneurs who are primarily driven by the intention to support others instead of maximizing their own utility (Bacq & Alt, 2018; Branzei et al., 2018; Dentoni et al., 2018; McMullen & Bergman Jr, 2017; Miller et al., 2012). However, since entrepreneurial actions can also lead to adversarial and destructive outcomes (Baumol, 1996; Shepherd, 2019; Wright & Zahra, 2011), previous research may be overly simplistic with regard to “taking for granted that prosocial organizing has positive societal impacts” (Wry & Haugh, 2018: 566). Accordingly, many questions remain regarding how the prosocial motivation and behavior of social entrepreneurs impact society not only in positive but also in negative ways (Bolino & Grant, 2016; Moroz et al., 2018; Powell et al., 2018; Wry & Haugh, 2018).

The considerable world-wide advocacy for social entrepreneurship activities over the past 40 years has been driven by a neoliberal approach between private wealth and public power, which rejects government intervention in solving problems in favor of market-based approaches (Kashwan et al., 2019; Spicer et al., 2019). These new institutional arrangements, often facilitated by social movements, networks and virtual communities, challenge existing relationships of power for disenfranchised persons. Critical to the success or failure of these arrangements are the contestations between global and local, both in terms of visible power, such as rules, authorities, and institutions, as well as the hidden sources of power, in terms of who controls institutions and how decisions are made (Gaventa, 2006). Even the World Bank has come to recognize economic inequality as attributed to power asymmetries located in social and political arenas, as local, national, and transnational institutions are inseparable from power (Kashwan et al., 2019). Ineffective management of the potentially contrasting demands of local empowerment and national or global structures may lead to community decision-making lacking the capacity to enact essential bureaucratic systems (Quintana & Campbell, 2019). Thus,

power is central to understanding the implications of social entrepreneurship practices in different contexts (Dey & Steyaert, 2016; Goss et al., 2011). In essence, power refers to "the ability to influence others' behavior, be it through persuasion or coercion" (Battilana & Casciaro, 2021: 1). To date, however, there is little knowledge regarding the use of power by social entrepreneurs (Kibler et al., 2019; Newth & Woods, 2014) and the power implications of the socio-spatial context in which entrepreneurial actors are embedded (Gorbuntsova et al., 2018; McKeever et al., 2015; Welter, 2011; Welter & Baker, 2021).

In this paper, I address these shortcomings in the context of transnational social entrepreneurship by introducing the concept of prosocial power, which I define as the ability of prosocially motivated actors to make a positive or negative impact in the lives of those they seek to support, be it directly or indirectly, intentionally or unintentionally. Based on my findings, I argue that this ability is significantly influenced by a certain socio-spatial embeddedness, as well as the human and social capital endowments that can be derived from it. My contextually sensitive theorization invites future research to extend my work towards the development of a general theory of prosocial power. It draws on research in the fields of education (Finn, 2012; Schrodt et al., 2008), psychology (Aydinli et al., 2014; Righetti et al., 2015), and sports (Cranmer & Goodboy, 2015), where prosocial modes of power were previously outlined as a source of prosocial behavior that intends to serve the well-being of others. However, previous research has also associated power not only with prosocial but also with antisocial behavior and decision-making (Baumann et al., 2016; Bolino & Grant, 2016; Magee & Langner, 2008). Even social entrepreneurs who are committed to deploy their "power as a force for good" to advance the well-being of others were found to be at risk of becoming self-focused and hubristic if they fail to cultivate their other-oriented empathy and humility (Battilana & Casciaro, 2021: 29). Therefore, this study extends existing research by focusing on the ambiguous outcomes that the prosocial power of social entrepreneurs can produce in vulnerable places which I define as underprivileged socio-spatial contexts that are peopled by individuals with a disadvantaged, oppressed, or marginalized social status.

My research theorizes from empirical explorations among three different types of transnational social entrepreneurs (TSEs), who are of either foreign, domestic non-indigenous, or local indigenous origin, and who seek to improve the living conditions

for indigenous community members (ICMs) in rural Ecuador. TSEs are understood as a group of high-capacity social entrepreneurs who migrate across borders and remain embedded in two or more socio-spatial contexts from where they can leverage material and immaterial resources that are otherwise inaccessible to non-transnational social entrepreneurs (Bolzani et al., 2020). The context of indigenous territories was chosen because many of these locations are considered vulnerable places in which the entrepreneurial agency for socio-economic development may be constrained by multiple forms of social exclusion and poverty (Peredo et al., 2004). At the same time, many exogenous entrepreneurship initiatives aimed at supporting indigenous communities are often misaligned with the indigenous world and frequently result in negative or ineffective outcomes (Jackson et al., 2008; Light & Dana, 2013; Peredo & McLean, 2013). However, the arrival and support of foreign social entrepreneurs can also bring desperately needed resources and services to indigenous places (Terjesen, 2007), while concomitant knowledge spillovers and training activities can seed and foster indigenous-led entrepreneurship activities (Marti et al., 2013; West III et al., 2008).

My work is guided by the following research question: *Why and how can the prosocial power of different types of TSEs lead to positive or negative social impact in vulnerable places?* My research contributes to entrepreneurship literature in three important ways. First, I advance the knowledge base on the correlations of the bright and the dark sides of prosocial organizing (Bolino & Grant, 2016; Moroz et al., 2018; Wry & Haugh, 2018) by introducing the concept of prosocial power into the field of entrepreneurship and by showing how it can work as a double-edged sword in vulnerable places. Second, I engage in a critical theorization of multi-contextual embeddedness (Baker & Welter, 2018) and address the lack of research on the power implications of diverse socio-spatial contexts for entrepreneurial practices (Welter, 2011). I do so by focusing on transnationally embedded social entrepreneurs in developed and developing economies. Third, I contribute to the lack of comparison among transnational entrepreneurs (Terjesen et al., 2016) by examining a diverse group of TSEs of foreign, national, and local origin. My study also provides propositions for future research and concludes with practical advice for policy makers and social entrepreneurs.

3.3 Theoretical foundations

3.3.1 The potential of social entrepreneurs

To alleviate the suffering of others, social entrepreneurs are often highlighted as promising change agents (Bornstein, 2004; Dees, 1998; Sharir & Lerner, 2006) who dare to address the most pressing societal problems that other individuals and organizations have so far been unable to solve (Zahra et al., 2009). Due to their primarily social mission (Lepoutre et al., 2013; Tracey & Phillips, 2007) and their ability to find entrepreneurial solutions for unmet social needs (Leadbeater, 1997), social entrepreneurs have the power to make a difference in regions where social deprivation is most salient. In fact, many of them actively choose to directly support disadvantaged others in developing countries (Austin et al., 2006), even if they would also be able to work in developed economies that provide more conducive institutional conditions for their social ventures (Stephan et al., 2015). Therefore, the typology of social entrepreneurs also comprises a significant proportion of prosocially motivated individuals who, due to altruistic traits and high levels of compassion and empathy, find satisfaction and fulfillment by increasing the welfare of others, rather than their own benefit (Bacq & Alt, 2018; Conger et al., 2018; McMullen & Bergman Jr, 2017; Miller et al., 2012; Mittermaier et al., 2021a; Sharma et al., 2018). They do so, for example, by leveraging their entrepreneurial capacity to acquire resources for the support of refugees (Mittermaier et al., 2021b), mobilizing volunteers to develop sustainable community enterprises (Farny et al., 2019), meeting victims' needs in the aftermath of natural disasters (Shepherd & Williams, 2014), integrating disadvantaged people into the workforce, or providing affordable housing by establishing common property regimes (Peredo et al., 2018). Ideally, such efforts result in the emancipatory empowerment of disadvantaged others by enabling them to break free from oppressive and constraining social orders that prevent social change (Haugh & Talwar, 2016; Rindova et al., 2009). However, it must also be noted that many social entrepreneurship initiatives have "proven capable only of tending to symptoms while the patient remains unwell" (Chalmers, 2021: 3).

Although the field of social entrepreneurship includes numerous positive examples of other-oriented venturing (Khavul, 2010; Mair & Schoen, 2007; Seelos & Mair, 2005a; Zahra et al., 2009), some scholars also advise against a "heroic characterization" of social entrepreneurs as this may lead to certain biases, such as

overlooking the many social entrepreneurship failures, as well as the social benefits generated by other kinds of organizations (Bacq et al., 2016; Chalmers, 2021; Dacin et al., 2011; Dey & Steyaert, 2010; Light, 2006). “Social entrepreneurs are not inherently moral beings who do the right thing in contrast to the rest” (Chell et al., 2016: 621). Some of them fall victim to overconfidence (Hietschold & Voegtlin, 2021) or drift into caring more about scaling a profitable business than the well-being of others (Ebrahim et al., 2014). Others cause detrimental societal impacts such as crime and social exclusion (Hall et al., 2012), even if prosocial motivations are at the very heart of their mission. Particularly in developing countries, the well-meaning efforts of powerful Western actors to “aid the rest of the world” have frequently led to more social costs than social value (Easterly, 2006; Munk, 2013; Unwin, 2007; Wilson, 2014). Asserted causes include an often inadequate and paternalistic “shoehorning” of Western ideas and practices (Shantz et al., 2018), along with the inability of many social entrepreneurs to bridge the sociocultural distance from disadvantaged communities in the developing world (Claus et al., 2021). Therefore, social entrepreneurs have to be exceptionally skilled to grow effective social enterprises for those they seek to support (Seelos & Mair, 2005a) and recognize the critical role of their socio-spatial embeddedness.

3.3.2 The opportunities and constraints of socio-spatial embeddedness

Socio-spatial embeddedness refers to an entrepreneur’s immersion in the social structures of a particular geographical place (Jack & Anderson, 2002; Trettin & Welter, 2011; Welter, 2011) and represents an important boundary condition that enables or constrains entrepreneurial abilities (Korsgaard et al., 2015; Korsgaard et al., 2021; Lang et al., 2014; Welter, 2011). The higher the embeddedness of a social entrepreneur in the community they seek to serve, the more likely it is that their practices will meet the needs of that community (McKeever et al., 2015), because they are anchored in a profound understanding of local norms and legitimacies (Kibler et al., 2015). However, to effectively alleviate the suffering of disadvantaged others in developing countries, a critical and common obstacle is that many locally embedded social entrepreneurs lack access to supportive institutions (Stephan et al., 2015). This makes effective resource-mobilization a difficult challenge in resource-scarce environments (Khavul & Bruton, 2013; Reypens et al., 2021b) as many resourceful foreign social entrepreneurs from an institutional support context often lack the

embeddedness in the sociocultural structures of the host context to effectively apply the required resources (Zahra et al., 2009). A potential corrective to this issue might be embodied by TSEs who combine distance and nearness to disadvantaged others through a transnational embeddedness within and outside the disadvantaged socio-spatial context.

TSEs are a hybrid type of transnational and social entrepreneurs that leverage a boundary-spanning migration background with the desire to improve the living conditions of others (Bolzani et al., 2020). As transnationals, they are a sub-category of migrant entrepreneurs (Sequeira et al., 2009) who are embedded in two or more geographical environments that they bridge through business-related linkages (Drori et al., 2009). The group includes returnee entrepreneurs who return home after having spent significant time abroad (Filatotchev et al., 2009; Qin et al., 2017; Wright et al., 2008) as well as immigrant entrepreneurs who remain connected with their country of origin (Drori et al., 2009). Because of their multi-contextual embeddedness, they are regarded as entrepreneurial elite who can tap into an extensive reservoir of tangible and intangible resources in multiple environments (Chen & Tan, 2009; Lin & Tao, 2012; Portes et al., 2002). Access to many of these resources is provided through their unique transnational network (Patel & Terjesen, 2011; Portes et al., 2002; Yeung, 2002), which puts transnational entrepreneurs in an advantageous position to recognize and exploit opportunities that are imperceptible to non-transnational entrepreneurs (Chen & Tan, 2009; Drori et al., 2009; Jack & Anderson, 2002). Moreover, their foreignness may be perceived as an asset rather than a liability (Stoyanov et al., 2018), as it enables them to access a plurality of cultural, linguistic, socio-economic, and political matters for themselves and others.

In disadvantaged socio-spatial contexts, the power of TSEs can be of particular importance. Since their multi-contextual embeddedness allows some of them to function as intermediaries between developed countries and the bottom of the pyramid, TSEs are able to facilitate efficient business transactions beyond informal markets and local level interactions (Kistruck et al., 2013). However, although some TSEs embody high levels of entrepreneurial effectiveness, this is no guarantee for positive social impact. Potential conflicts are particularly likely to arise when social entrepreneurship efforts in vulnerable places involve actors from highly different social backgrounds (Powell et al., 2018).

Many indigenous territories are arguably among the world's most underprivileged socio-spatial contexts. As those who have benefitted least from globalization and the expansion of the Western world system, indigenous peoples continue to suffer from social exclusion, economic dependency, and cultural repression (Hall & Fenelon, 2016). To escape their disadvantaged position, many regard self-organized entrepreneurial activities as a feasible means for attaining higher independence and better socio-economic circumstances (Anderson et al., 2006; Peredo et al., 2004; Tapsell & Woods, 2010). However, as the entrepreneurship ecosystem is significantly underdeveloped in most indigenous territories (Peredo et al., 2004), many indigenous communities continue to rely on the support of external actors, including TSEs. Ideally, this assistance can activate indigenous-led entrepreneurship through valuable resource provision, education, and capacity building (Cahn, 2008; Li et al., 2018; Terjesen, 2007). On the dark side, it risks perpetuating the long history of colonial domination by foreign powers if external efforts continue to ignore alternatives to imposed Western ideals (Jackson et al., 2008) as well as the desire and ability of indigenous peoples to address their socio-economic well-being through arrangements based on their own political and cultural ideals (Hall & Fenelon, 2016). As previous research suggests, it is through the promotion of indigenous agency (Peredo et al., 2004), intellectual and practical interactions instead of impositions (Marti et al., 2013), and the facilitation of community-led venture creation (Haugh, 2007b; Peredo & Chrisman, 2006) that external actors might make a positive difference in indigenous places. However, the mechanisms of power that enable or constrain social entrepreneurs to enhance their possibilities for action remain under-researched (Dey & Steyaert, 2016) and call for a better understanding of why and how the power of different types of TSEs can lead to positive or negative social impact in vulnerable places.

3.4 Context and method

3.4.1 Empirical setting

The journey of this research project started in 2016 when the first author went to Ecuador to study traditional agroforestry systems in the Amazon region. He was intrigued by the ambitions and struggles of a certain group of TSEs who had migrated to Ecuador but leveraged their ongoing home-country embeddedness to turn local

resource and market deficiencies into new opportunities for enhanced livelihood of local indigenous communities.

Latin America represents one of the world's most inequitable regions with unique empirical conditions to investigate social entrepreneurship phenomena in relation to vulnerable populations (Aguinis et al., 2020). Although management and entrepreneurship research in the Latin American region has sharply increased in recent years, the vast majority is concentrated in Brazil, Mexico, and Chile, while scientific production from, in, and on Ecuador is highly underrepresented (Ronda-Pupo, 2016). Ecuador represents one of the world's most biodiverse countries and, at the same time, a developing economy that depends on official development assistance from abroad. Approximately 7% of its people who self-identify as indigenous (CEPAL, 2014) have a long-standing history of systemic oppression and continue to suffer from social exclusion, poverty, violence, and limited access to public resources and services (Picq, 2018). They have also been disproportionately affected by the COVID-19 pandemic (Ortiz, 2021). Indigenous movements in the region have frequently demonstrated their political power, e.g., by making Ecuador the world's first country to include the "Rights of Nature" in its constitution, by toppling three presidents, or by successfully defending their territories against several extractivism projects. However, despite this, they remain a disadvantaged and marginalized societal group.

To change the status quo, locally-based transnational social entrepreneurship initiatives were highlighted as potential levers for better socio-economic development in the most vulnerable parts of Ecuador (Scarlato, 2013). This puts many hopes on multi-contextually embedded social entrepreneurs and their power to leverage and combine transnational resources and knowledge from inside and outside Ecuador to have a positive social impact.

3.4.2 Sample selection

I purposefully sampled a set of 12 TSEs who are of either foreign, domestic non-indigenous, or local indigenous origin and who seek to alleviate the suffering of indigenous communities in rural Ecuador (see Tables 1 and 2). The group of Foreign TSEs consists of six individuals of non-Ecuadorian origin who migrated to Ecuador and established a social enterprise that works with indigenous communities. The group of Domestic TSEs is represented by four individuals of Ecuadorian, but non-

indigenous, origin who returned to Ecuador and established a social enterprise after spending significant time abroad. The group of Indigenous TSEs consists of two individuals from indigenous Naporuna Kichwa communities who also returned to Ecuador and established a social enterprise after previously living abroad. The TSEs were identified by the first author while he volunteered for three of the TSE enterprises (Upano, Aguarico, and Jubones) in 2016. From an initial selection of 16 potentially suitable TSEs cases, 12 TSEs remained after a deeper screening process based on whether or not the individuals fulfilled the predefined criteria of: (1) having migrated or re-migrated to Ecuador; (2) living in Ecuador for more than five years; (3) having founded or co-founded a social enterprise that works with indigenous communities in rural Ecuador; and (4) leveraging transnational embeddedness and prosocial motivation to make a positive impact in indigenous contexts.

I used a maximum variation sampling approach (Lincoln & Guba, 1985) to cover a broad variety of TSE perspectives and selected a heterogeneous set of TSEs from the USA, the UK, South Africa, Switzerland, and France, as well as Ecuadorian returnees of indigenous and non-indigenous origin who previously lived in different developed country settings. Furthermore, the TSEs are active in a range of different industries, including food and beverages, education, timber, community development, and jewelry. In line with the goal of achieving theoretical saturation (Eisenhardt, 1989), the authors regarded the selected data set as sufficient for this study once it became apparent that any additional case would add only marginal incremental value to the findings. The original names of all individuals and organizations in this study were replaced by fictional names to protect the identities of the participants.

Table 1: Cases of foreign transnational social entrepreneurs

Category	Foreign TSE		Foreign TSE	Foreign TSE
TSE Name	Evan Blue		Phil Brown	Graham Green
Company Name	Upano	Zamora	Aguarico	Jatunyaku
Industry	Food & Beverage	Food & Beverage	Community Development	Timber
Indigenous beneficiaries (approx.)	2500 families	15 families	2300 families	500 families
Founding date	2010	2018	2013	2006
Transnationality	Born and grown up in the USA; lived in Costa Rica.		Born and grown up in South Africa; lived in the UK, Taiwan, China, and Sweden.	Born in Japan, grown up in the USA
Date of birth	1983		1976	1978
Migration to Ecuador	2010		2005	2005
Languages	English; Spanish		English; Spanish; Africans	English; Spanish
Higher education	Undergraduate studies in Environmental Philosophy and Latin American Studies; Graduate studies in Environmental Management		Undergraduate studies in Business Administration; graduate studies in Environmental Management and Policy	Undergraduate studies in Economics & International Relations
Former professional experience	Serial Entrepreneur; Environmental Consultant; Advisor on climate change and forestry		Office Clerk; English Teacher; Sustainability Consultant; Program and Project Manager	Entrepreneur; Project Manager for an international conservation foundation in Ecuador

Cases of foreign transnational social entrepreneurs (continued)

Category	Foreign TSE	Foreign TSE	Foreign TSE
TSE Name	Jacques Beige	Matthew Purple	Simon Black
Company Name	Curaray	Tomebamba	Tiputini
Industry	Food & Beverage	Food & Beverage	Education
Indigenous beneficiaries (approx.)	600 families	200 families	20 individuals
Founding date	2005	2018	2014
Transnationality	Born and grown up in France	Born and grown up in the UK	Born and grown up in Switzerland; lived in the USA
Date of birth	1982	1988	1962
Migration to Ecuador	2005	2007	2013
Languages	English; Spanish; French	English; Spanish	German; English; Spanish; some Quechua
Higher education	Undergraduate studies in Cellular Biology and Physiology; graduate studies in Ecology and Management of Agrosilvopastoral Systems in Tropical Zones	Undergraduate studies in History and Law	Apprenticeship in Architecture; Undergraduate studies in Graphic Art Studies
Former professional experience	Agroforestry Volunteer	Bank employee; Office Clerk; Employee in the mining industry; English Teacher	Entrepreneur; Volunteer in tutoring, hotel management, animal rescue, and reforestation

Table 2: Cases of domestic and indigenous transnational social entrepreneurs

Category	Domestic TSE	Domestic TSE	Domestic TSE
TSE Name	José Orange	Pablo Bronze	Alan Red
Company Name	Yanuncay		Jubones
Industry	Food & Beverage		Education
Indigenous beneficiaries (approx.)	150 families		50 families
Founding date	2015		2015
Transnationality	Born and grown up in Ecuador; lived in the UK	Born and grown up in Ecuador; lived in the US	Born and grown up in Ecuador; lived in the USA and Africa
Date of birth	1988	1989	1980
Migration to Ecuador	Not applicable	Not applicable	Not applicable
Languages	Spanish; English; basic German and French	Spanish; English	English; Spanish; French
Higher education	Undergraduate studies in Law; graduate studies in Law and Finance	Undergraduate studies in Engineering; Marketing & Management	Undergraduate studies in International Education
Former professional experience	Lawyer; Real Estate employee	Entrepreneur; Sales Manager; Project Manager; Marketing Analyst	International Marketing Coordinator; Peace Corps Volunteer

Cases of domestic and indigenous transnational social entrepreneurs (continued)

Category	Domestic TSE	Indigenous TSE	Indigenous TSE
TSE Name	Cesar Pink	Yarik Silver	Sinchi Aqua
Company Name	Zarumilla	Tarqui	Jama
Industry	Food & Beverage	Jewelry	Food & Beverage
Indigenous beneficiaries (approx.)	1500 families	200 families	550 families
Founding date	2002	2016	1996
Transnationality	Born and grown up in Ecuador; lived in Germany, Portugal, and Peru	Born and grown up in Ecuador; lived in the USA, South Korea, Italy, and Germany	Born and grown up in Ecuador; lived in Spain
Date of birth	1971	1988	1974
Migration to Ecuador	Not applicable	Not applicable	Not applicable
Languages	Spanish; English; Portuguese; some German and Italian	English; Spanish; Quichua; Italian; French; Portuguese	Spanish; Quichua
Higher education	Undergraduate studies in Law; graduate studies in Business Administration	Undergraduate studies in International Relations, Political Science, and Public Administration; graduate studies in Public Policy	Business studies in Spain
Former professional experience	Lawyer; Entrepreneur	Coordinator of International Relations; Governmental Advisor; Project Manager; Consultant	Founded a range of small business ventures

3.4.3 Data collection process

In an iterative research process, I undertook four different visits to Ecuador with a total length of 20 weeks over the course of four years between 2016 and 2019. A total of 67 interviews were conducted with an average length of 56 minutes. Initial data collection took place over six weeks between April and June 2016 and involved the collection of 15 semi-structured interviews. A second visit was carried out for four weeks between June and July 2018 which resulted in another 15 interviews. To follow up, another trip over three weeks took place between November and December 2018, including 11 interviews, while a final visit was made over eight additional weeks between August and October 2019, resulting in another 26 interviews. Depending on the language the interviewees felt most comfortable with, the interviews were conducted in either Spanish or English.

To explore the TSE phenomenon from multiple perspectives, the interviews were the main source of data and had a major focus on the three different TSE sets (30 interviews) as well as the related indigenous community members (ICMs) of Kichwa, Shuar, and Sápara ethnicities (17 interviews). The ICMs were approached either after a previous introduction through local friends of the ICMs or after several community visits as part of the volunteering work. To also understand the broader social context of the prosocial entrepreneurship dynamics between TSEs and ICMs, further interviews were conducted with employees and volunteers of the social enterprises (8 interviews), TSE business partners (5 interviews), locally active international development agencies (3 interviews), a representative of an indigenous advocacy group (1 interview), the CEO of an Ecuadorian business incubator (1 interview), a former Ecuadorian president (1 interview), as well as with an indigenous rights activists and professor from an Ecuadorian university (1 interview). The interviews took place in the Pichincha province of the Andean region, as well as in the Napo, Orellana, and Pastaza provinces of Amazonian Ecuador. They were supplemented with participant observations during the voluntary work in the social enterprises, community visits, and passive participation in meetings between ICMs and TSEs. In addition, I analyzed 364 items of TSE-related archival data including newspaper and website articles, company reports, books, case studies, and promotion material. The recurrent research journey with reflexive triangulation and an

iteration over 4 rounds allowed me to constantly refine the focus and capture the different dimensions of the phenomenon.

3.4.4 Data analysis

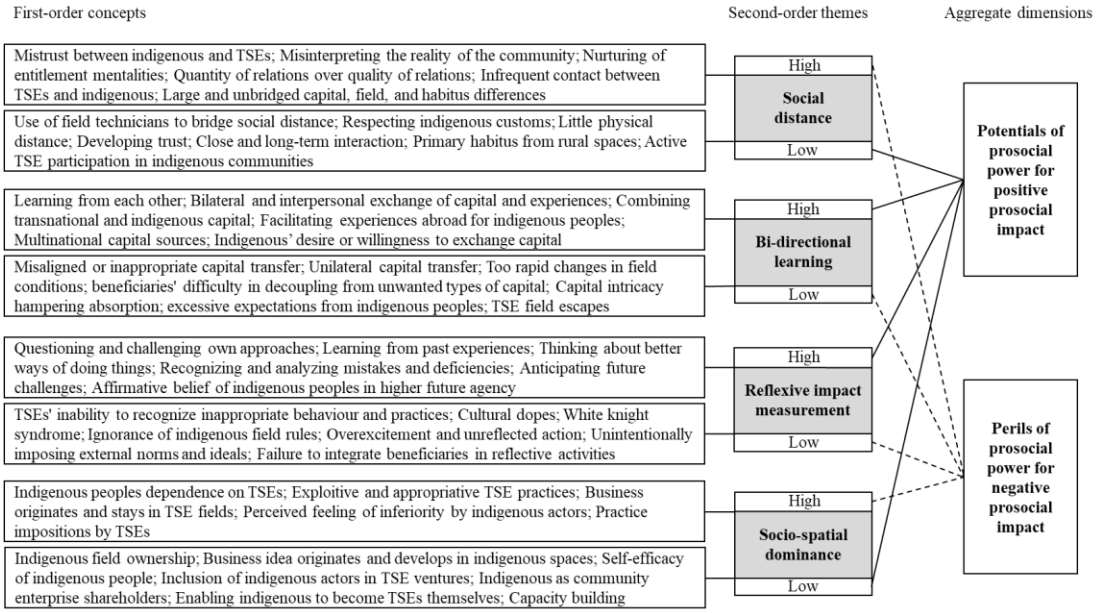
I applied an abductive approach to phenomenon-based theorizing (Fisher et al., 2021) in relation to the prosocial power phenomenon that I observed among TSEs. This approach involves contrastive reasoning and is used to identify unexpected and undertheorized phenomena, challenge assumptions, confirm anomalies, and generate plausible explanations that make the anomalies understandable (Bamberger, 2018; Sætre & Van de Ven, 2021). The approach allows for the advancement of existing theories and perspectives in relation to the phenomena (Fisher et al., 2021). Following Locke et al. (2008), who regard "doubt" as the engine of abduction, I question the taken-for-granted perspective that prosocial organizing produces only positive impact (Wry & Haugh, 2018) and explore how TSEs *may be* promising change agents whose prosocial power can have both a positive and negative impact.

I conducted my data analysis in a three-phase process using NVivo software. In phase one, I created a database that allowed me to organize the cases and verbatim interview transcriptions as well as further data that I collected in relation to the TSE cases. In phase two, I structured my data into coding units. For each TSE set, I comparatively examined the social configurations of the TSEs in terms of their embeddedness and their capital endowments as a first indicator for their prosocial power. In phase three, I conducted an initial and a focused coding process (Charmaz, 2006). The initial coding process involved an open coding procedure (Corley & Gioia, 2004) in which I identified important information in my data and converted the respective sentences and paragraphs into representative first-order concepts. Then I turned to a focused coding procedure of axial and selective coding. In the former, I reviewed the data on a deeper level and identified relationships between first-order concepts that led me to the creation of representative second-order themes. I then grouped these second-order themes into aggregate dimensions to enable the move to theorization.

The coding process involved multiple rounds to iteratively refine the concepts, themes, and dimensions and was carried out by the first author. However, to verify the validity of the coding and to increase its objectivity through intercoder reliability,

the second author independently coded one of the interview transcripts and subsequently compared the work of the first author with his own analysis of the data[1]. As a result, I ended up with four second-order themes as regularities for the two aggregate dimensions of either positive or negative social impact, depending on whether the first-order concepts were classified as potentials or perils of prosocial power. Figure 1 provides an illustration of the coding process (see Table 7 in the appendix for supplementary material).

Figure 1: Data structure



3.5 Findings

3.5.1 Elements of prosocial power

In my comparison of TSEs and ICMs, I identified three elements that I regarded as important preconditions of prosocial power. The first element pertains to the prosocial motivation to reduce the suffering of others. For the TSEs in this study, this motivation had varying reasons. While some of them had a life-long desire to improve the social and environmental circumstances for ICMs, others turned to prosocial organizing

[1] After discussion, the two coders agreed on the elimination of one redundant second-order theme from each other's coding file and decided to group a set of first-order concepts in one new second-order theme that was labeled "field dominance" and later renamed it as "socio-spatial dominance" during the review process.

following shocking experiences during their previous involvement in anti-social and environmentally destructive work in rural Ecuador.

> *Foreign TSE Blue: When I was a little kid, I told my best friend that we're gonna need to save the rainforest. … And so, I went to school and when in college I went down to Southern Chile, to Patagonia, to do a class on conservation biology. And that's why I really got excited about Latin America and conservation. … I wanted to study more how we could find more resources to help farmers in Latin America to plant trees and conserve the forest.*
>
> *Foreign TSE Purple: I worked in mining. … And we destroyed a lot of the jungle and people there. It was a turning point, and I do feel like I'm kind of paying a bit of restitution now.*
>
> *Domestic TSE Orange: I actually grew up for a few years in the Amazon, because my dad was an army officer. ... I was in the Amazon during wartime as a little kid, growing up there.*
>
> *Indigenous TSE Silver: We are really connected to our territory and to our land. When I was growing up, living by the river, doing all those things. … That bond will never disconnect. … I think I have been given a great chance and a great opportunity, a great life. And I cannot jeopardize that by not working with indigenous peoples.*

The second element consists of facilitative socio-spatial embeddedness. The territories of the ICMs in this study can be described as vulnerable contexts where access to employment and public services is significantly underdeveloped while poverty is rampant. With the sparse availability of necessary resources for socio-economic development, local ICMs are highly constrained in their ability to derive power from the indigenous context itself. The ICM Sisa Waylla described the situation as follows:

> *ICM Waylla: What happens is that the economy in the communities is very low, there is not much income, so they also live as in ancient life. … For example, in [my community] we have seen that there are many suicides because parents do not have the money to allow their kids to study. … There is alcoholism because they cannot go to university, they cannot do what they would like to do because of economic limitations. So that makes them interested in drugs, alcohol. They go out to the city, to steal, and there are many problems.*

In contrast, all TSEs of this study migrated or re-migrated from developed countries to Ecuador. Their ongoing transnational embeddedness enabled them to bridge the resource-rich and institutionally supportive external contexts with the resource-scarce and institutionally underdeveloped environments of rural Ecuador to discover new support mechanisms for the ICMs. For instance, a common pattern is

to buy local commodities from the ICMs, turn them into value-added products, and sell them in international markets to distribute economic surpluses back to the communities. Especially the Domestic and Indigenous TSEs appreciated the value of their linkages abroad to leverage new opportunities in their home country.

> *Domestic TSE Orange: Studying abroad, that changed my life. … I want to be number one in my country. … I can do something with Ecuador, and I can take it to the world.*
>
> *Indigenous TSE Aqua: Well, regarding the training they gave me in the Basque country, they always told me to think of making money, doing things differently than in the community. So, up until now, I have that mentality of doing things differently. And that principally generates profit for the members.*
>
> *Indigenous TSE Silver: That experience [abroad] has helped me to become the person I am right now. I think that life experience has helped me to pull through my things and to set up my goals. … I feel I am lucky that I can give back to the community.*

In contrast to many non-transnational foreign entrepreneurs or foreign employees of the several NGOs who work with ICMs in Ecuador on mostly temporary projects and with limited-term visas, the TSEs also demonstrated a long-term commitment to their work as they permanently (re-)migrated to Ecuador. A former director of an international NGO in Ecuador reported:

> *Jules Turgouis: This is what's happening right now every day with NGOs. They come, they do projects – like we were doing a project on Alpaca wool with women from communities. But the project has two more years and then "Ciao." I know what's going to happen. When we will go, it will just disappear.*

The third element of prosocial power relates to the embodiment of universally valued and economically convertible forms of human capital (knowledge, capabilities, and experiences) and social capital (the material and immaterial resources accessible through their social networks). Although the ICMs in this study were observed as resource-rich social actors who possess a cornucopia of human and social capital, including large and durable social networks with co-ethnics as well as an immense amount of knowledge about the natural environment, very little of this capital is adequately valued by the outside world; turning it into economic income thus remains an arduous challenge for the ICMs.

> *Foreign TSE Black: These people have an incredible knowledge in relation to the forest. When I walk through the jungle with them I almost feel like a physically disabled man as they are so agile and see so many things that I cannot see. So, they have enormous and incredible talents…. [But] they can*

> *barely do math, hardly write Spanish, English almost nothing. Basically, they are on a very low educational level.*

In contrast, the TSEs in this study already possessed, or were able to access, an abundance of internationally valuable resources and capabilities that they brought into indigenous contexts. For instance, all of them are fluent in at least two languages, studied at higher education institutions, had previous professional and/or entrepreneurship experiences, were exposed to different environments outside Ecuador, and maintained resourceful international networks. Leveraging these human and social capital advantages provided them with another source of prosocial power to establish a social enterprise where indigenous efforts struggled.

> *ICM Waylla: When an enterprise works, it is because there is a foreigner, I can say for myself. Because they have a lot of experience and you learn many things. Because they know how to handle things, capacitate.*

In summary, all TSEs were prosocially motivated and arrived with a place and capital configuration that opened unique opportunities for social change in indigenous territories. However, the mere possession of high prosocial power was not a guarantee for having a positive social impact on the ICMs. This required the careful orchestration of four additional elements.

3.5.2 Impacts of prosocial power

To understand why and how prosocial power can impact disadvantaged others not only for the better but also for the worse, I identified four key themes as being decisive potentials or perils of prosocial power, depending on whether their levels are high or low: Social distance, bi-directional learning, reflexive impact measurement, and socio-spatial dominance.

3.5.2.1 Social distance

Social distance refers to “the perceived degree of similarity/dissimilarity of the entrepreneur (ego) from the important parties (alters) in the venture space” (Branzei et al., 2018: 555) and was found to vary significantly between the different TSEs and ICMs. For the Indigenous TSEs, their social distance from the ICMs was the lowest, since both the TSEs and ICMs are of Naporuna Kichwa ethnicity and share the same language, worldview, and historical legacy. In contrast, the Foreign TSEs exhibited the highest social distance, given their international rather than Ecuadorian or indigenous provenance, while the Domestic TSEs lay in the middle of the continuum,

with Ecuadorian but non-indigenous origins. The lower the social distance, the easier it was for the TSEs to connect with the ICMs and build trust for their social mission.

> *Indigenous TSE Silver: I've been an activist and I am Kichwa myself. That gives me the capacity to work with indigenous people. … Because when you are indigenous, people trust you more. It's not that white person going to the communities who wants to take the resources out.*
>
> *Indigenous TSE Agua: Yes, for us as Kichwa, for us it is easier. … Most [indigenous] people understand more in our language, in Kichwa. … There is more trust. There is no fear that if I say a word it is offensive to them or offensive to me. It is these small things.*
>
> *Domestic TSE Pink: This is a megadiverse country, sociologically too. Every valley has a different culture. … I think that is a big handicap for all these people who are really coming from another world. To translate that: You're going to be a foreigner here forever. That's a fact, and everyone knows it. Even if you lived here for 20 years, they are going to call you gringo. … You're more than welcome, but you are a gringo.*
>
> *Domestic TSE Orange: The Amazon is like another planet. Honestly. There are no rules. Unless you really want to help to liaise between the world and the Amazon, the Western world if you wanna call it. So, it's really hard for someone who's not living there to do that.*
>
> *Foreign TSE Beige: In rural areas, it takes very long to build trust. Very very long.*

Having low social distance also implied a better understanding of the social world of the ICMs, while high social distance led to misunderstandings or even conflicts that were at cross purposes with the prosocial motivation of the TSEs. For Domestic TSE Orange, for example, his social distance frequently exposed him to the rejection of his transaction agreements with the ICMs and complicated his work – an experience shared by other Domestic and Foreign TSEs but not by the Indigenous TSEs.

> *Domestic TSE Orange: So, for us, you buy something, you pay for it, and you receive it. In their case, sometimes for example you ask for 10kg and they give you 100kg. And they get angry if you don't buy it all. They feel that you have the obligation to buy from them, everything. … Because they live in a different mindset. There's no such thing as a contract. The Amazon is like this. … It's not going to take your rules.*

To bridge the social distance, a common approach of both Foreign and Domestic TSEs was to hire local intermediaries who are familiar with both the indigenous and the non-indigenous context. This was particularly important at the beginning of the prosocial venture process to build trust with the ICMs and to avoid

misunderstandings. Otherwise, high social distance usually led to unintended consequences. For example, before Foreign TSE Blue found suitable intermediaries to work with, he stumbled into a situation that caused more harm than good. On one weekend, when his team could not reach the community to fulfill an agreed commodity purchase because a storm had washed a bridge away, the lack of knowledge on how to deal with the communities and their long history of external exploitation experiences caused tensions and destroyed the trust between the two parties for a long time after.

> *Foreign TSE Blue: So, we went up on Monday and everybody in the community was super mad because we had not bought [the commodity]. … It was just something to be dealt with in a negotiation, you know, find some middle ground. But they were just instantly mad. So, they locked [my colleagues] into the schoolhouse. Nobody knew what it was like to work with these indigenous communities, and they did not know what it was like to work with us. … And then an old woman came out with ají [a spicy chili sauce] to rub into their eyes. And then [my colleagues] were like "Ok, ok, we pay you." They gave them as much money as they could and left and then the community sent [the commodity]. But everyone was so mad, somebody had sh*t into [the commodity].*

To build more trustful and stable relationships, the TSEs realized that they needed not only the right intermediaries but also to engage more in direct personal interactions to reduce their social distance over time. Based on these findings, I offer the following proposition:

> ***Proposition 1**: Social entrepreneurs who are able to minimize the social distance with the disadvantaged others they seek to support have a greater chance of leveraging their prosocial power for positive social impact in vulnerable places, while those who are unable to do so will tend to fail in such leveraging.*

3.5.2.2 Bi-directional learning

Through their continuous work with the ICMs, most TSEs managed to create an interactive learning space where different forms of resources and knowledge are disseminated and absorbed over time. The TSEs realized the need to learn from each other instead of merely imposing something new on the other side. But on the indigenous side, too, there has been a strong willingness to receive and internalize complementary knowledge from the TSEs as a means to become increasingly self-determined in a globalized world.

> *Carla Gold (employee of Foreign TSE Brown): We are learning to work together. We have our way of work. They have their own way of work. … Both*

sides have to learn from their past experiences, too. And come to the fact that it takes more time and effort to get results that are sustainable. You cannot have six-month projects. That goes nowhere.

ICM Puka: It is interesting to learn new ideas, get to know the culture, how they see things differently than the communities.

ICM Ankas: The external support, the international support I would say, of the companies who come to help the communities, is very welcome. As I said, many [indigenous-led] things have failed because of this lack of knowledge and internal organization.

Indigenous TSE Silver: We have to learn about the culture of money. Because in the Amazon we are not very used to the culture of money and capitalism. We grew up with a different set of rules. Just transitioning to that and learning that is a big challenge for us. And we must learn that. How to manage that without exhausting the resources of the community, the soil, and nature. I think that is a big challenge and I am still trying to learn.

A rather unorthodox approach in this direction was followed by Foreign TSE Blue. After the first disastrous encounter with one community (see above) temporarily prevented further interaction, he decided to set up a separate homestay program for international "interns" to live within the community for several months. In this way, he wanted to sensitize the different cultures to each other, while the community would also receive economic income from the interns, who were mostly anthropology and ethnobotany students from the USA.

Foreign TSE Blue: I said: "Let's send an intern as, like, an offering of peace. To live there for, like, six months. And also, that way they can get to know gringos, feel closer to them." And so we did it. And then we kept sending people there. … I think we basically helped soften their weird feelings about dealing with foreigners.

ICM Yurak: Yes, the volunteers who come here are a support for the community. Above all, the exchange of experience, what we live and what they live. We here in the community do not reject, we rather welcome. … If that company [of Foreign TSE Blue] had not come, we would not have had sufficient resources for our families.

However, due to the heterogeneous social configuration of the actors involved, not all kinds of resources and knowledge were easily transferable, especially when these had little correlation with the social world of the ICMs or were not introduced to them holistically, with sufficient respect for the indigenous perspective. New TSE projects in particular were often endowed with external forms of human and social capital that were poorly aligned with the indigenous world. ICM Sanchi Ankas explained:

> *ICM Ankas: Many times, the failure of the support companies is to come and give money, come and give a project when there are no people with the capacity to work, with the capacity to maintain. So many times, we do not have that capacity and preparation.*

Another ICM reported a case in which a Foreign TSE leveraged her transnational embeddedness by enabling a local indigenous community cooperative to produce value-added products from local commodities and sell them through a large international retailer in the USA. As long as the Foreign TSE accompanied and managed the project, it generated a significant income surplus for the participating communities. However, because the ICMs were insufficiently equipped with the necessary knowledge and external experiences to understand the requirements of the international client, the business suddenly collapsed when the Foreign TSE handed the project over to the community and left. In a different case, a jungle lodge for international tourists was established by another Foreign TSE and handed over to the community after its completion. Since the ICMs did not have the chance to develop a sufficient understanding of the basic demands and expectations of international visitors, the lodge received several negative online reviews, and this project quickly collapsed as well.

> *Foreign TSE Black: I know many projects like this. People who constructed a lodge and gave the responsibility to the community. It has decayed, it is run-down.… The machine, or the hotel, like in the example, was used until the door was cracked, and then maybe they put a nail, a padlock, but they do not repair it. It is not maintained. That's the missing thought. And if you want a project that runs for longer, you have to accompany it.*

Without high levels of continuous, bi-directional learning for mutual understanding and capacity building, the prosocial power of the TSEs had little if any positive impact in indigenous contexts. Based on these findings, I offer the following proposition:

> ***Proposition 2**: Social entrepreneurs who engage in constant and bi-directional learning processes with the disadvantaged others they seek to support will have a greater ability to leverage their prosocial power for positive social impact in vulnerable places, whereas those who do not are likely to fail to do so.*

3.5.2.3 Reflective impact measurement

Although many TSE ventures have become impressive success stories for social change in rural Ecuador, their journeys have never been smooth and often involved

cases of unintended harm. In this regard, reflexive impact measurement was found to play a decisive role for having a positive social impact. Reflexivity refers to "the regular exercise of the mental ability, shared by all normal people, to consider themselves in relation to their (social) contexts and vice versa" (Archer, 2007: 4). Through high levels of reflexivity, the TSEs became aware of their position in relation to the ICMs and the rules of the game in indigenous places.

> *Foreign TSE Purple: Here you really have to put yourself into a different mindset. … The way you should treat people here is very different from the way you treat people in the UK.*
>
> *Foreign TSE Black: The way they communicate, it is very different. I don't mean just language. They communicate very differently. They interpret many things through their dreams and feelings. Things that I will possibly never fully understand, but where we can learn so much.*
>
> *Foreign TSE Orange: Contracts are not for them, they are for us! And this is kind of a way in which we really have to think what they are going to think about what we do with them, in order to really be able to be successful.*

Furthermore, their reflexivity enabled the TSEs to learn from previous failures by reconsidering, reliving, and reimagining their prosocial motivation and behavior in relation to the indigenous context. Thus, the reflexive questioning of their prosocial power was found to be an important factor for the TSEs to take corrective measures towards positive social impact.

> *Foreign TSE Brown: Maybe there is a little bit of resentment sometimes. Because they [the ICMs] are not doing it, just seeing the outsider doing it.*
>
> *Foreign TSE Blue: [My colleague] was like "they held our team hostage, the rubbed ají in their eyes, and they pooped in our [commodity], that's not ok. We can't work with them". And I said "No! we have to work with them. We have to just keep building trust." And he's like: "But it wasn't our fault." … And I was like "Yeah, but we can't say that. … We've got to keep working there. We have to work through it. We can't just get mad at them."*
>
> *Domestic TSE Orange: We have also had all sorts of problems, don't get me wrong. Like, it's not that our relationship [with the ICMs] is perfect. … Something we learned was that it's better to work with less. We started actually with 300 growers and went down to 150.*

Based on these findings, I offer the following proposition:

> ***Proposition 3**: Social entrepreneurs who reflexively examine and adjust their practices will be more likely to leverage their prosocial power for positive social impact in vulnerable places, whereas those who do not will tend to fail to do so.*

3.5.2.4 Socio-spatial dominance

Since the transnational embeddedness of the TSEs was highly conducive to opportunity recognition in indigenous contexts, the social entrepreneurship concepts and practices were predominately developed and executed by them instead of the ICMs. This led to the consequence that the social ventures were almost entirely dominated by the TSEs.

> *Indigenous TSE Silver: Most NGOs or companies come and tell them [the ICMs] what to do.*
>
> *Indigenous TSE Aqua: I am rather against that kind of help [of Foreign and Domestic TSEs]. It just makes people more dependent. It does not allow them to develop their way of being, their way of making decisions. Someone always says, "do this".*

However, with more interpersonal and reflexive capital exchange over time, most TSEs started to gradually reconsider and restructure the power relationships between themselves and the ICMs which involved four different patterns. In the first pattern, the TSEs created innovative products or services from local resources that they sold through disintermediated value chains on international markets. This enabled the communities to sell their goods at higher price levels and receive a larger proportion of the return on sales as a means of empowerment through economic income. Although this pattern enabled many ICMs to emerge out of extreme poverty, it also created resentment when the TSE domination remained high while the ICMs were kept in a dependency relationship as mere commodity suppliers.

> *ICM Chajllakulli: For my community, a Kichwa community, the sales of [the raw material] means employment for us. It's a great chance. We have been working with [TSE Blue] for 2 years and we have been selling [the raw material]. It is a profitable product … It is bought at a good price. 105 families benefit from the sales of this product.*
>
> *ICM Waylla: Yes, it is a great help because, as I say, it grows the capacity of more people and communities and in terms of money. … But there are also those jealousies. … The indigenous groups that are cultivating [the product] do not have much profit. … Those who earn more are foreigners.*

The second pattern involved a higher inclusion of ICMs into the TSE businesses, either by employment and training on higher hierarchical levels (e.g., as accountants or field technicians), by becoming company shareholders, or by becoming the leaders of specific business units or value chain activities. Although this

model distributed more power to the ICMs and reduced their dependency, business ownership and socio-spatial dominance remained with the TSEs.

> *Foreign TSE Green: We actually have a hybrid structure where we have community shareholders, and we [the founders] are coming in as entrepreneurs. They did not put any money investment in it, resources beyond their land. But they've put in 'sweat equity' if you will. … We have these bright and motivated women from the communities who actually proved that they can lead the business in the forest. Really cool.*
>
> *ICM Laran: Before, I was always a bit dependent on somebody else. But not anymore. … I make decisions. I have my responsibilities. Sometimes I say no. … I've learned a lot. I've grown. And it also helps me a lot that I learn the theory in my studies, and I can apply it at work. … I am studying accounting and auditing.*
>
> *ICM Maywa: The work has given me good opportunities and personal development. I am the coordinator of costs and finances. … I am with this company for quite a while now and I have grown and developed a lot. What I want to do now is to also look for new ventures, new ideas for work. … I want to replicate other ideas in other communities.*

In the third pattern, the intentions for the establishment of a social venture originated in indigenous contexts while the ICMs also dominated the enterprise and its revenue streams. The role of the TSEs in this pattern was merely to assist and advise (e.g., in terms of business training, education, translations, or international expansion). Foreign TSE Brown and three ICMs who are leading three different community enterprises reported:

> *Foreign TSE Brown: These thousands of projects that people were funding in the Amazon like to do good work. But very few of them get to a stage where local stakeholders are actually leading the projects. And to me, it was like, until you get there, really, you're kind of wasting your time if you want to save the Amazon. Because either you need to discontinue financing this project or white people who are working on these projects need to live there forever.*
>
> *ICM Kuri: The community was heading the first stage. … It was well-received. As I said, several young people were trained there [by Foreign TSE Brown]. Then we were doing courses, training … We have been making a great effort, great work. And for a year and a half, I have been occupying the position of manager of the enterprise. … And we ourselves improve; we generate more sources of income for the community members.*
>
> *ICM Puzu: The idea was of the community. And then I began to process better, and understand better, and I sent a message to [Foreign TSE Evan Blue]. We are the guides who decide. They do help us make conversations, negotiations, because we do not speak English. Their contribution is very important to us, we make decisions on how and where we spend. … The project is successful; it has a very positive impact on the territory.*

> *ICM Sañiy: My idea was to do tourism one day. A family enterprise. … It is a project that has a good destiny. I am happy and grateful to [Domestic TSE Red's team], who are bringing many visitors to me. ... But also, my son, he did training on the internet. Now they come from there. So, the payments are directly with me. … Now I have a job and more opportunities.*

As a fourth pattern, some of the TSEs also realized that the lack of transnational embeddedness among the ICMs was another missing link for indigenous empowerment and the execution of their own entrepreneurial intentions in a global market. Therefore, Foreign TSE Black arranged long-term education placements for young Kichwa individuals in Switzerland, while Indigenous TSE Aqua made it possible for one ICM to represent his community and co-ethnics on several international business summits and political forums in North America and Europe. The objective was to help the ICMs become TSEs themselves and develop a global mindset and the prosocial power to become future bridging agents between the indigenous world and international contexts. Based on these findings, I offer the following proposition:

> ***Proposition 4**: Social entrepreneurs who gradually empower disadvantaged others will be better able to leverage their prosocial power for positive social impact in vulnerable places, whereas those who dominate the socio-spatial contexts of those they seek to support will fail to do so.*

3.6 Discussion

Researchers on prosocial organizing have argued that "[f]or those with strong communal orientations and moral identities, power leads to greater prosocial behavior" (Bolino & Grant, 2016: 629). However, given the numerous failures of social ventures aimed at alleviating the suffering of others, there is plenty of empirical evidence that the power of social entrepreneurs does not automatically lead to a positive social impact. Instead, it also carries the risk of becoming a hegemonic force that exacerbates the suffering of the disadvantaged groups they are supposed to benefit (Honig, 2021; Khan et al., 2007).

The unpredictable role of power dynamics has been largely avoided by social entrepreneurship scholars, with a few exceptions (e.g. Dey & Steyaert, 2016; Goss et al., 2011; Newth & Woods, 2014). However, subtle relations may govern the expectations, attitudes, and behaviors of both the social entrepreneurs and the communities they interact with. In a broader sense, asymmetrical power relations exist not only because of historical dependencies based on colonization but also under

neoliberal paradigms where responsibilities are shifted from the state to social enterprises (Dey & Teasdale, 2016). Thus, studying and understanding the power relations that exist in the institutional environment represents a critical link in evaluating the evolution of community benefit organizations and any resulting impact, either positive or negative (Korstenbroek & Smets, 2019). Governments, in offloading responsibilities through neoliberal policies, may actively promote myths regarding the utility and advantages of social entrepreneurship (Mason & Moran, 2018). Power includes the concealed neoliberal discourse, carried and promoted by TSEs, referred to as "invisible power" (Korstenbroek & Smets, 2019: 477). These social entrepreneurs may be unwittingly carrying these myths from community to community, country to country. My research addresses this important issue and adds to entrepreneurship theory by examining how prosocial power is embodied by social entrepreneurs with different contextual embeddedness levels as well as why and how its exercise can lead to positive and negative social impact when these embodied models diffuse. In particular, I examine situations where domination is not the asserted goal and demonstrate the agency opportunities for actors to dynamically alter established power relations.

3.6.1 The prosocial power of social entrepreneurs

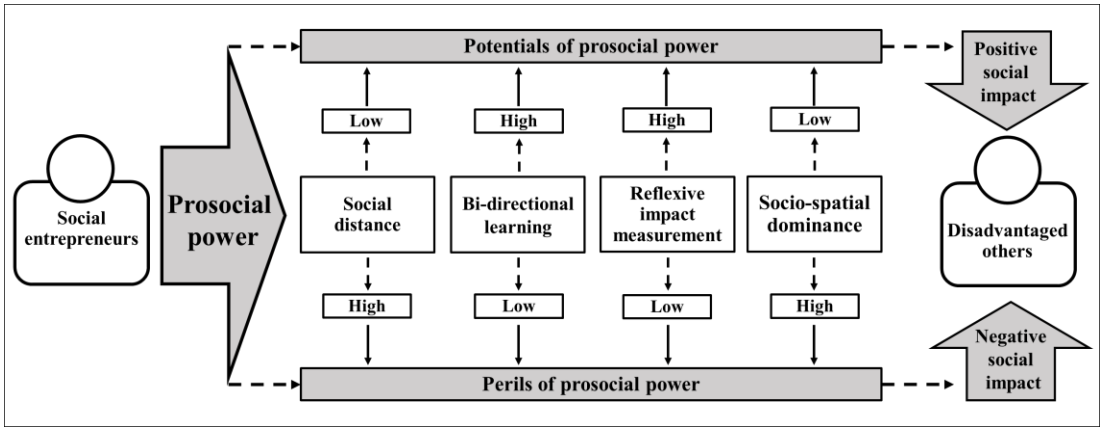
The study defines prosocial power as the ability of social entrepreneurs to make a positive or negative impact on the lives of others. Drawing on the TSEs phenomenon, I argue that this ability is particularly related to the socio-spatial embeddedness of social entrepreneurs as well as the human and social capital endowments that can be derived from it. In this sense, multi-contextually embedded social entrepreneurs can leverage a unique capital portfolio and a rich contextual understanding that increases their prosocial power. In contrast, social entrepreneurs with single-context embeddedness lack the multi-focal understanding to deploy tangible and intangible resources in an effective, efficient, and context-sensitive way. This puts them at a comparative disadvantage to their multi-contextually embedded counterparts who can combine distance and nearness to disadvantaged others (Marti et al., 2013). However, my research also critically challenges the often heroic portrayal of transnational entrepreneurs as elitist and distinctive change agents (Chen & Tan, 2009; Lin & Tao, 2012), who might seem to be universally effective in alleviating the suffering of others. To contribute to the emergent field of transnational social

entrepreneurship (Bolzani et al., 2020), I demonstrate that TSEs embody a high ability to enact social change in vulnerable socio-spatial contexts, but I also highlight that their prosocial power simultaneously implies certain risks that can lead to detrimental social impact. This addresses the under-researched ambiguity of prosocial organizing (Bolino & Grant, 2016; Moroz et al., 2018; Shepherd, 2015; Wry & Haugh, 2018). By addressing the lack of contextual comparison among transnational entrepreneurs (Terjesen et al., 2016), my research further reveals significant differences in the social configurations among three different TSE types. For some of them, it requires more effort than for others to create positive social impact for disadvantaged others.

3.6.2 The potentials and perils of prosocial power

Based on my findings, I argue that the impact of prosocial power is essentially influenced by different levels of social distance, bi-directional learning, reflexive impact measurement, and socio-spatial dominance that exist between social entrepreneurs and the disadvantaged others they seek to support (see Figure 2). This also led me to suggest a set of propositions as a way to strengthen the contribution and to provide a roadmap for future research (Gioia et al., 2013).

Figure 2: The potentials and perils of prosocial power



In terms of social distance, I argue that the social origin of social entrepreneurs and their ability to bridge varying social distances play a critical role in determining the impact of their prosocial power. As my findings show, the Indigenous TSEs were able to connect with the ICMs on a much deeper level than Domestic or Foreign TSEs since they were bound by ethnicity, worldview, and historical context, even though significant differences exist between the different indigenous groups. While a high

social distance still allows for the introduction of innovative social entrepreneurship projects, the sustainable impact of those projects is rather questionable, due to the lack of a context-sensitive understanding of the unmet needs of a socially distant other in vulnerable places. To mitigate the social distance from those whose suffering they seek alleviate, social entrepreneurs can use intermediaries, who ideally belong to the same sociocultural group or have a sociocultural background similar to that of the support recipients, as bridging agents. It is critical, however, that intermediaries are not used as a replacement for direct interactions between social entrepreneurs and disadvantaged others, as this is likely to cause further misunderstandings and conflicts (Claus et al., 2021). Through constant personal interactions that are mediated by local experts with low social distances, social entrepreneurs can develop stronger local embeddedness and reduce their social distance. The higher the embeddedness of an entrepreneur in a specific socio-spatial context, the better their entrepreneurial performance in this environment and the higher the chances for positive social impact (Jack & Anderson, 2002). Having low social distance also implies a stronger identification with the support recipients, which paves to way to switch from individual to collective prosocial efforts (Branzei et al., 2018).

A second element of prosocial power relates to the bi-directional learning between social entrepreneurs and disadvantaged others. Inappropriate or too rapid resource and knowledge transfers can lead to a hysteresis effect, wherein the recipient's ability to internalize the new inputs is disturbed (Bourdieu, 1977). Furthermore, the learning process typically comprises of not only explicit but also contextually grounded tacit knowledge (Polanyi, 1966) that requires ongoing immersion and collaboration experiences for its interpersonal exchange (Muñoz et al., 2015; Polanyi, 1966). If the learning pace is not aligned with the social configuration of the recipient's context, it represents another peril of the prosocial power of social entrepreneurs.

To overcome the complications of bi-directional learning, reciprocal and dynamic interaction and knowledge exchange processes between disadvantaged communities and outside actors are critical (Marti et al., 2013; Qureshi et al., 2018; Sutter et al., 2014). Unlike teachers in the classroom or coaches on the playing field, whose use of certain "prosocial power bases" (e.g., rewarding students for certain performances) was found to create effective learning experiences for the students or

athletes (Cranmer & Goodboy, 2015; Finn, 2012; Schrodt et al., 2008), I argue that social entrepreneurs operate in a very different educational setting, where they must be empathetic teachers and learners at the same time to produce a positive impact for disadvantaged others (Freire, 1996). If social entrepreneurs are able to engage in an ongoing and bilateral process of interpersonal knowledge and resource exchange in mutual agreement with the recipients of their support, I argue that both sides will gain a better mutual understanding that guides their personal interactions.

Reflexive impact measurement marks a third element of prosocial power. When social entrepreneurs arrive with pre-reflexive and unquestioned attitudes from external contexts, it might cause misperceptions of the socio-spatial rules in the host context. Without critical monitoring of their work, I argue that social entrepreneurs may fall victim to their intuitions and unconsciously impose taken-for-granted beliefs on disadvantaged others as another peril of their prosocial power. While previous research has portrayed the entrepreneur as a "reflexive agent engaging in purposeful action" (Sarason et al., 2006: 287), my research points to the limited capacity of entrepreneurial reflexivity (Mutch, 2007), which can unleash a cascade of failure for social work in disadvantaged environments (Van Wijk et al., 2020). However, social entrepreneurs can mitigate this peril by forcing themselves to constantly challenge their own intentions and behaviors. Developing higher levels of reflexivity can also enable them to identify new prosocial opportunities (Yitshaki et al., 2021), learn from failures, anticipate future challenges, and detect contradictions with respect to their envisioned social impact.

A fourth critical element of prosocial power pertains to the socio-spatial dominance of social entrepreneurs. Since social entrepreneurs with a multi-contextual embeddedness usually possess a large store of internationally valuable resources and knowledge, they often represent the dominant class in vulnerable places. This dominance violates the freedom and autonomy of disadvantaged others and establishes implicit hierarchies wherein social entrepreneurs stand above the support recipients, thereby losing their prosocial legitimacy. Much criticism of Western development projects centers on this form of dominance (Easterly, 2006; Peredo & McLean, 2013) and questions the commonplace image of "the social entrepreneur who is portrayed as the proverbial embodiment of ethical virtuousness" (Dey & Steyaert, 2016: 628).

In this study, I identified four different patterns of socio-spatial dominance with critical implications for social impact. These patterns also reflect several options through which disadvantaged individuals can, with varying effectiveness, "step away from victimhood in the direction of emancipation" (Baker & Welter, 2017: 178). I describe the first pattern as a *support pattern* in which social entrepreneurs act as "social intermediaries" (Kistruck et al., 2013) who aim to economically assist disadvantaged others through the redistribution of profit surpluses from international sales of local products or services. Although this pattern often increases and diversifies the economic income of the disadvantaged, they often remain dependent suppliers of labor and commodities, while the social entrepreneurs continue to dominate the place. By moving on to an *inclusion pattern*, support recipients participate at higher hierarchical levels by becoming direct employees or shareholders of the social enterprise. Although the dominance of the social entrepreneur is reduced in this pattern, the venture is still owned and controlled by the social entrepreneur. In support of the view that social change requires social entrepreneurs to promote higher levels of individual agency and empowerment (Haugh & Talwar, 2016), my findings indicate that the minimization of external domination requires an *ownership pattern*. In this pattern, social entrepreneurs act as "institutional intermediaries" (Sutter et al., 2017) who merely support external field transactions while the prosocial work is dominated and controlled by the support recipients. However, since a sophisticated understanding of international markets by the support recipients is often still absent in this pattern, as in the case of the ICMs, I argue that effective empowerment and emancipation ideally demands a *transition pattern* in which disadvantaged others are additionally enabled to gather context-spanning experiences by living abroad to become transnationally embedded social entrepreneurs themselves. Since socio-spatial contexts have a significant impact on "the entrepreneur's life course and identity, including how they see the world and what roles they can play" (Baker & Welter, 2017: 178), the two Indigenous TSEs in this study demonstrate that transnational experiences can significantly enhance this impact. However, despite the promising potential of the transition pattern, I would like to note that the facilitation of international placements can also provoke a brain-drain effect, with high-potential support recipients deciding to stay abroad instead of returning home. This effect is particularly common in the developing world (Venkataraman, 2004). There might also

be cases of a “crab mentality effect[2]” when disadvantaged peers develop envious and resentful attitudes toward those who are enabled to leave a vulnerable place and, consequently, try to hold them back, which might lead to new conflicts. However, the Indigenous TSEs in my study reported a strong social bond to their community that brought them back to support their fellow ICMs.

In summary, I empirically highlight the importance of context-based power relations for social entrepreneurs, examining and theorizing how they can either succeed or fail at their transformational objectives. I thus address largely overlooked assumptions regarding the embeddedness of entrepreneurial actors, providing important theoretical insights on context-spanning social entrepreneurship. Specifically for multi-contextually embedded social entrepreneurs, I argue that it is essentially through low social distance, high bi-directional learning, high reflexive impact measurement, and low socio-spatial dominance that they can leverage the potential of their prosocial power for a positive social impact on disadvantaged others. Conversely, it is through high social distance, low bi-directional learning, low reflexive impact measurement, and high socio-spatial dominance that the prosocial power of social entrepreneurs can act as catalysts for negative social impact.

3.7 Limitations and future research directions

In this paper, I wish to recognize five important limitations. First, this research took place in a single country, Ecuador, where the level of entrepreneurship activity was found to be the second-highest in the world, after Chile’s (Bosma et al., 2020). This implies several institutional-level dynamics that influence the work of social entrepreneurs and calls for additional research on the TSE phenomenon in other global regions. Second, my theorizing on the potentials and perils of prosocial power in vulnerable places was derived from explorations in an indigenous context and might differ for multi-contextually embedded social entrepreneurs who work with other vulnerable societal groups, such as homeless people, refugees, or forced laborers. Third, both TSEs and indigenous communities are highly heterogeneous groups whose multifarious peculiarities cannot be fully captured by the small set of qualitative cases that I have presented in this paper. In Ecuador alone, 14 indigenous

[2] This can be described as "if I can't have it, neither can you". It is derived from the behavior patterns of crabs trapped in a bucket.

nationalities are officially distinguished, each representing a distinct societal group with its own social structure. While I conducted interviews with indigenous peoples from Kichwa, Shuar, and Sápara nationalities, the two Indigenous TSE cases in my study are both Naporuna Kichwa people who are working with other Naporuna Kichwa communities and should not be regarded as representative for other indigenous groups within or outside of Ecuador. Since indigenous entrepreneurs with transnational embeddedness are also deeply underrepresented in the entrepreneurial landscape, I regard future research on a broader set of Indigenous TSEs from around the world as highly important. A fourth limitation of my work relates to the migration direction of TSEs. While I have looked at individuals who migrated or remigrated from developed countries to the developing country of Ecuador, future research is needed to explore the prosocial power of those social entrepreneurs who migrate across emerging economies or from emerging economies to advanced economies. The fifth limitation relates to my elaboration on the potential of prosocial power to make positive or negative differences in the lives of others. In this regard, I want to highlight that there might also be a third dimension of social impact that neither helps nor harms in a meaningful way, which might be no less interesting to explore in future research.

I see further promising research potential in the prosocial power of entrepreneurial individuals to alleviate the suffering of those who are most affected by contemporary societal challenges, such as the COVID-19 pandemic, racial and gender inequality, climate change, or economic recession, and call for an institutional level perspective on the prosocial work of transnational entrepreneurs. The TSEs in this study also demonstrated considerable differences in their motivation to engage in prosocial organizing, with some being driven by a life-long desire and others by certain positive or negative life events. Therefore, as highlighted by Bolino and Grant (2016), it remains another open question whether prosociality is a permanent trait or a temporary state of social actors. Finally, I believe that it will be useful to investigate the links between the psychological distance resulting from the level of abstraction at which multi-contextually embedded social entrepreneurs psychologically construe disadvantaged others in vulnerable contexts (Trope & Liberman, 2010) and the nature of the relations between these two groups of actors.

3.8 Practice and policy implications

My study also has important implications for social entrepreneurship practitioners and policymakers. For TSEs, I seek to raise awareness that their prosocial power not only comes with several opportunities to create positive social impact but also carries a number of significant risks and responsibilities. TSEs should deliberate whether their efforts are directed towards the right types of entrepreneurial activities and if they can enhance their social impact by facilitating more empowering international learning and TSE-building experiences for disadvantaged others. The facilitation and funding of international work and education placements is equally critical for local policymakers. However, resource constraints in developing countries require more institutions in developed countries to enhance their support and assistance to achieve sustainable development goals. In terms of foreign education, the Chevening Programme of the UK or the Fulbright Programme of the USA are notable examples through which talented individuals from developing countries can acquire a transnational identity for improved social entrepreneurship in their home country. In terms of labor migration and the development of transnational diaspora and returnee entrepreneurs, the Federal German Migration and Diaspora Programme serves as another institution that enables migrants to acquire expertise in Germany and provides them with professional support to subsequently start a business in their country of origin. It is thus critical for policymakers to enable more disadvantaged individuals and ethnic minorities to participate in these programs instead of those who are already privileged.

3.9 Conclusion

In this article, I introduced the notion of prosocial power as the ability of prosocially motivated actors to make a positive or negative difference in the lives of others. I contributed to the scarce entrepreneurship research on the correlation of the bright and the dark sides of prosocial organizing. My findings suggest that prosocial power can work as a double-edged sword with both beneficial and detrimental social impacts on disadvantaged others, depending on how social entrepreneurs leverage their social configuration in vulnerable socio-spatial contexts. Specifically, I demonstrated how prosocial power is embodied by different types of TSEs who work with disadvantaged others and argue that it is especially through the careful orchestration of social distance, bi-directional learning, reflexive impact measurement, and socio-spatial dominance that these entrepreneurs can direct their prosocial power towards

positive social impact. I hope that this study encourages future research on the causes and effects of prosocial power in different socio-spatial contexts to further the burgeoning interest in prosocial and multi-contextual entrepreneurial motivation, behavior, and impact.

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4 Polycratic governance in hybrid organizations (Paper 2)

4.1 Abstract

For hybrid organizations that combine commercial and social welfare logics in a theoretically post-bureaucratic form of organization, the perpetuation of traditional bureaucratic governance practices that embrace economic efficiency, hierarchy, and organizational routines has been widely regarded as detrimental for their capacity to drive social change and innovation. Yet bureaucracy continues to dominate the organizational landscape, while alternative governance approaches remain largely absent or underdeveloped. In this paper, I explore the re-enchantment of collegiality as a previously marginalized polycratic governance concept that embraces a participatory collective and discuss its potential in the context of two heterogenous social enterprises, one of which failed in the integration of collegiality while the other succeeded. My findings suggest the transformation of two specific collegiality elements to re-enchant the concept as a human-centered alternative to bureaucratic governance.

4.2 Introduction

Organizations continue to be major contributors to societal inequality (Bapuji et al., 2020; Porter & Kramer, 2011; Stainback et al., 2010), especially when their organizational structures and practices are narrowly aligned with the bureaucratic ideal of unremitting economic efficiency, entrenched hierarchy, and impersonal rationalization (Amis et al., 2020; Banerjee et al., 2020; Hayes et al., 2018). This particularly concerns organizational governance systems which, critics argue, remain "profoundly oligarchic, hierarchical, and unequal" in most organizations around the world (Landemore & Ferreras, 2016: 54). Bureaucracy has proven itself as remarkably persistent in organizational practice (Monteiro & Adler, 2022), and the progressive digitalization of an economy and society dominated by a small group of digital platforms risks perpetuating bureaucratic structures instead of transforming them. Critics have argued that "the digitalization of relational life pushes technocratic bureaucratization of the world much further, with the risk of slowing down if not stifling innovation, neutralizing bottom-up institutional entrepreneurship", and thereby undermining the capacity for social change towards a more just and egalitarian social system (Lazega, 2020: 4). However, new technological developments, mounting globalization, and recent global challenges such as climate change, the financial crisis, or the COVID-19 pandemic have also put the traditional organizational modes of operation under increasing pressure. Arguably, the 21st century is experiencing a radical institutional shift in which alternative organizational forms and governance concepts are on the rise (Alvarez et al., 2020; Kokkinidis, 2015; Muñoz et al., 2020; Sama et al., 2021), while the legitimacy of traditional capitalist ways of organizing is progressively undermined (Adler, 2001; Battilana et al., 2020; Davis, 2016).

In response to these phenomena, an increasing number of organizations is following a hybrid organizational model that integrates a broader set of organizational values and objectives for more sustainable and less capitalistic ways of organizing (Battilana et al., 2012; Porter & Kramer, 2011; Ramus et al., 2017; Skelcher & Smith, 2015). Social enterprises, for example, are regarded as 'an ideal type of hybrid organization' since they combine social and commercial value creation activities at the very core of their mission (Battilana & Lee, 2014). This kind of hybrid organizing reveals new opportunities for innovation and social change (Jay, 2013; Tracey et al., 2011), but also implies the need for alternative and post-bureaucratic governance

concepts in which social and commercial logics can co-exist (Battilana et al., 2020; Bruneel et al., 2020; Bruneel et al., 2016; Ebrahim et al., 2014; Filatotchev et al., 2020; Mair et al., 2015).

Despite the rapid expansion of hybrid organizations, the development of suitable governance templates that reflect their distinct requirements is still in its infancy. Fields of inquiry include legal forms, voluntary accreditations, as well as intra-organizational governance systems for organizational management, control, and accountability (Cornforth, 2020). Since bureaucratic governance models are widely regarded as impracticable for hybrid enterprises (Battilana et al., 2018; Ebrahim et al., 2014; Wolf & Mair, 2019), some of these organizations have moved away from traditional models and started to experiment with deviant governance approaches that combine and balance multiple institutional logics (Mair et al., 2015: 713). This has also triggered the re-enchantment of pre-existing and previously marginalized governance concepts that are based on participatory decision-making and a polycratic dispersion of power.

Max Weber (1968) explicitly highlighted democracy and collegiality as two major political governance concepts that are based on a polycratic logic "in which power is divided among the members on a theoretically egalitarian basis" (Waters, 1993: 56). Recent research in organizational theory, however, has exhibited a clear imbalance on the two Weberian types. While democracy is intensely discussed among organizational scholars (e.g. Audretsch & Moog, 2020; Courpasson & Dany, 2003; Harrison & Freeman, 2004; Hielscher et al., 2014; Johnson, 2006; Kerr, 2004; Lee & Romano, 2013), collegiality has been largely overlooked (Denis et al., 2019; Lazega, 2001, 2020). This is in spite of explicit calls of younger generations for alternative organizational regimes with more collegial ways of decision-making (Pfeffer, 2013) that are characterized by a 'dominant orientation to a consensus achieved between the members of a body of experts who are theoretically equal in their levels of expertise but who are specialized by area of expertise' (Waters, 1989: 956). Contrary to a bureaucratic governance logic that is based on hierarchy, routine-tasks, and an exclusive focus on economic efficiency, collegiality embraces a participatory collective to innovate and leverage new business opportunities for social change (Lazega, 2020).

To meet the needs of contemporary society through transformative modes of organizing, Lazega (2020) has theorized on a stratigraphic continuum with collegiality on one end and bureaucracy on the other. He leaves open, however, which combination of collegiality and bureaucracy is the most appropriate to produce the intended outcomes. In this regard, Thornton (2021) has suggested the research setting of hybrid organizations and the application of an institutional logics perspective as particularly promising to unearth new knowledge in this direction.

In this paper, I follow this call and particularly address the collegiality side of the continuum by asking whether and how collegiality may be a functioning alternative for the polycratic governance of hybrid organizations. I also adopt the institutional logics perspective as a highly influential institutional research framework (Lounsbury & Beckman, 2015; Thornton et al., 2012) that encompasses the ”socially constructed, historical pattern of material practices, assumptions, values, beliefs, and rules by which individuals produce and reproduce their material subsistence, organize time and space, and provide meaning to their social reality” (Thornton & Ocasio, 1999: 804). My inquiry is based on empirical data from two hybrid organizations from the Global North and the Global South that adopted a collegiality concept for their intra-organizational governance. While one organization continues to thrive with its collegiality concept, the other one failed. In the analysis of the two cases, I identify which collegiality elements are particularly critical for a re-enchantment of the concept in a hybrid organizational context and discuss potential alternatives to these elements.

I make three major contributions. First, I advance the emergent literature on hybrid enterprise governance (e.g. Battilana et al., 2015; Cornforth, 2020; Ebrahim et al., 2014; Mair et al., 2015; Wolf & Mair, 2019) by theorizing on the re-enchantment of collegiality as a previously marginalized approach to polycratic governance. Second, I contribute to knowledge about collegiality as a viable tool for social transformation in contemporary society by exploring the applicability of its six major elements in the context of hybrid organizations, proposing a neo-collegial conceptualization. Third, as little governance theory for hybrid organizations is derived from empirical evidence (Mair et al., 2015), I respond to calls for a closer look at real-life examples to provide new empirical insights for the enhancement of hybrid enterprise governance (Mair et al., 2020)as well as for the advancement of the institutional logics perspective along four analytical dimensions that were recently

proposed by Gümüsay et al. (2020). The latter concerns: (1) *Macro-level positioning* (by connecting the cases to the major institutional shift in organizational governance practices); (2) *contextuality* (by using empirical examples from the Global South and the Global North); (3) *temporality* (by addressing the temporal disenchantment, enchantment, and re-enchantment of organizational governance practices); and (4) *value plurality* (by focussing on hybrid organizations whose raison d'etre is characterized by a blending of social and commercial value creation activities).

4.3 Literature

4.3.1 The governance of hybrid organizations

Hybrid organizations are the tangible outcome of a progressively adopted set of principles that do not conform to the bureaucratic ideal that underpins the market logic of the capitalist system. Social enterprises, for example, as one of the most emblematic types of hybrid organizations (Bauwens et al., 2020), leverage economic efficiency only as a necessary means to achieve greater social ends (Tracey & Phillips, 2007). This requires social enterprises to combine and balance the conflicting and traditionally incompatible logics of social and commercial value creation in a hybrid format (Battilana & Dorado, 2010; Litrico & Besharov, 2019; Mair et al., 2015; Pache & Santos, 2013). Although the bureaucratic principle of routinized, hierarchical, and impersonal economic calculation is not entirely rejected by hybrid organizations, it is significantly depreciated and coupled with more humanitarian ideals for sustainable growth and the reduction of economic, social, and environmental inequality (Battilana et al., 2012; Boyd et al., 2017). In Weberian terms, hybrid enterprises can be regarded as a post-bureaucratic type of organization in which *instrumental rationality*, as a purely means-based, efficiency-seeking calculation that dominates the capitalist economy, is diluted with a stronger emphasis on *value rationality* that is “determined by a conscious belief in the value for its own sake” (Weber, 1968: 24). In dealing with this complexity, hybrid organizations are confronted with unique governance challenges (Bruneel et al., 2016; Ebrahim et al., 2014) that demand alternative governance practices and concepts (Battilana et al., 2018; Filatotchev et al., 2020; Wolf & Mair, 2019). Major fields of inquiry include legal structures, voluntary accreditations, as well as intra-organizational governance and management systems.

Legal structures that incorporate the value plurality of hybrid organizations remain largely absent in most countries around the world. In response, a common, albeit administratively complex strategy for many hybrid enterprises is to register their multi-purpose organization under two separate legal entities that include one traditional for-profit and one traditional non-profit under one roof (Battilana et al., 2012). However, a growing number of governments have started to recognize the distinct requirements of hybrid organizations and created dedicated legal frameworks in which the bureaucratic paradigm of unrelenting profit maximization is legally constrained by instruments such as dividend caps or asset locks. Examples include the *community interest company* (CIC) in the United Kingdom, the *low-profit limited liability company* (L3C) in the United States, the *gemeinnützige Gesellschaft mit beschränkter Haftung* (gGmbH) in Germany, the *cooperativa de iniciativa social* (CIS) in Spain, or the *impresa sociale* in Italy. These legal frameworks also provide hybrid organizations with a public identity and greater legitimacy to internal and external stakeholders (Cornforth, 2020; Ebrahim et al., 2014), to become recognized as post-bureaucratic organizations.

Voluntary accreditations are another increasingly adopted governance instrument for hybrid organizations to communicate and legitimize their identity, especially in countries where dedicated legal forms are unavailable (Moroz et al., 2018) or where sustainability legislation is weak (Lucas et al., 2022). A popular example is the B Corp certification, issued by the US non-profit enterprise B Lab which conducts voluntary impact assessments among participating hybrid enterprises that must reach a minimum impact score of 80 out of 200 points to obtain the coveted certification. Under the objective to redefine the capitalist system, assessment criteria not only include the social and environmental impact of the organization, but also its governance (André, 2012). While bureaucratic governance practices negatively affect the impact score, high employee ownership, as well as participatory, inclusive hierarchies are beneficial to it and further encourage the development of post-bureaucratic ways of organizing.

Intra-organizational governance and management practices are a particularly important pillar for hybrid enterprises to organize their value plurality. In times of unprecedented societal transitions towards a ‘New Normal’ in which the well-being of society as a whole marks the core business purpose for many organizations (Muñoz

et al., 2020), we also witness a political restructuring of organizational regimes in which traditional bureaucracy is softened and combined with alternative ways of organizing (Courpasson & Clegg, 2006). In this sense, post-bureaucratic firms adopt various forms of political hybridity in which bureaucracy is integrated into democracy (Courpasson & Dany, 2003), polyarchy (Courpasson & Clegg, 2012), or collegiality (Lazega, 2001, 2020). What these hybrid regimes have in common is a broader decentralization of power and control, higher levels of collective and participatory decision-making, as well as an attenuated focus on economic rationalization, which warrants their rethinking as promising governance concepts for organizational and societal transformations.

4.3.2 The re-enchantment of collegiality

Collegiality is a polycratic governance concept that stands in contrast to the dominant institutional logic of bureaucracy. While bureaucracy is traditionally characterized by authoritarian hierarchies, calculative routines, and impersonal interactions, collegiality is defined as "a form of endogenous organization based on exploratory and innovative tasks, carried out by peers who seek various forms of agreements to coordinate and use personalized relationships to do so" (Lazega, 2020: 40). Its six major elements include (1) *professional career* in which organizational members do not regard their work as a contractual obligation or in terms of self-interest, but rather as "a set of vocational commitments to suprapersonal norms"; (2) *theoretical knowledge* that is differentiated with respect to each organizational member and applied for the benefit of others; (3) *formal autonomy* in which organizational members have the freedom to independently pursue organizational goals; (4) *formal egalitarianism* in which the members of the organization are theoretically regarded as equals; (5) *scrutiny of product* in terms of peer evaluation and informal control; and (6) *collective decision-making* in committee systems that ideally follow a consensus procedure (Waters, 1989: 957).

Collegiality has a long history as a collectivist governance concept in different organizational bodies including governments (Weber, 1968), courts (Siebert et al., 2017), religious institutions (Wilde, 2004), and universities (Dearlove, 1997), where it has existed in various forms across societies and functional domains (Sciulli, 1986). Its origins as a field of research can be attributed to the work of Max Weber who, in his famous reflections on the growing 'disenchantment of the world' (Weber, 1946),

put forward a rather pessimistic outlook for the social wellbeing of humanity under the capitalist system that followed the Enlightenment. In Weber's view, society would imprison itself in an 'iron cage' of teleological efficiency and calculation that would alienate people from their work and displace traditional forms of collective organization, including collegiality (Weber, 1930, 1968). In this sense, Weber saw little potential for collegiality to endure as a governance concept in a capitalist system that required high levels of instrumental rationalization (Waters, 1989). Confirming Weber's argument that rational-bureaucratic organizing provides higher economic efficiency, it became isomorphic across organizational fields (DiMaggio & Powell, 1983), while collegiality became deinstitutionalized. In recent years, however, the discussion around the Weberian ambivalence of bureaucracy and its ability to cope with contemporary societal challenges has revived (Courpasson & Reed, 2004; Greenwood & Lawrence, 2005; Kallinikos, 2004; Suddaby et al., 2017). Whether it is enabling, coercive, or both, it is argued, depends on the core activities of the organization (Adler, 2012). For hybrid organizations, as non-capitalistic entities whose core activities are traversed by a combination of social and commercial logics, bureaucratic organizing becomes problematic and warrants consideration for the re-enchantment of collegiality, which Sahlin and Eriksson-Zetterquist (2016: 2) describe as "a modern, efficient and practical form of governance".

4.4 Context and methods

4.4.1 Empirical context

Although hybrid organizations with multiple and often competing institutional logics exist in several different forms and manifestations (Jay, 2013; Smith & Besharov, 2019), the empirical setting of social-business hybrids is considered as 'particularly apt' to advance research on pluralistic organizations in general (Kraatz & Block, 2017) and the theoretical continuum between collegiality and bureaucracy in particular (Thornton, 2021). Especially social enterprises were highlighted as an ideal case to study hybrid organizations since they combine commercial and social logics at the very core of their mission (Battilana & Lee, 2014). Following this direction, I conducted research among two social enterprises from Ecuador and Scotland that have developed an individual prefiguration of the collegiality concept. The heterogeneous context was chosen because of the precarious tendency of an institutional logic

perspective to neglect “potential sources of contextual richness” by “depicting, privileging and universalizing a Northern-centric institutional scaffold” (Gümüsay et al., 2020: 6). By focusing on hybrid organizations from the Global South and the Global North, I seek to unearth richer insights on collegiality as a global phenomenon that exists in both collectivistic and individualistic societies. In this section, I provide a brief overview of the two cases (in which I have changed the original names since some participants preferred to stay anonymous).

4.4.1.1 ScotOrg

ScotOrg is a Scottish social enterprise that was jointly established in 2016 as a CIC by five Scottish individuals who also decided to run it collectively. The organization produced and sold innovative premium beverages and distributed 100% of its profits to a charitable organization that supports socially disadvantaged individuals. ScotOrg’s products were an instant success and quickly became available in more than 200 stores, shops, and bars, as well as in seven of the UK’s leading wholesale distributors. This brought the venture the economic capital necessary to bring its social mission to life. Soon after the inception of the company, another equally recognized member was integrated into the founding team to better handle the operational side of the business. However, despite the company’s organizational success, underpinned by its highly-skilled, experienced, and dedicated individual members, ScotOrg soon encountered major challenges with its collegiality governance concept. After resulting internal tensions eventually became unsurmountable, the company shut down in 2019.

4.4.1.2 EcuadOrg

EcuadOrg is an Ecuadorian social enterprise that was legally registered as a non-profit organization in 2018, due to the absence of dedicated legal forms for hybrid organizations in Ecuador. Its members are from Ecuador, South Africa, and the USA. The company’s mission is to build resilient indigenous community enterprises by enabling them to produce and internationally commercialize value-added products from local resources. EcuadOrg consists of six core team members and five external board members. Like ScotOrg, it relied on highly knowledgeable and specialized individual members who underpinned its thriving social and commercial performance. Unlike ScotOrg, however, EcuadOrg demonstrated a significantly better adaptation to a collegiality logic in alignment with the distinct characteristics of the organization and

its members. At the time of writing, the company remains in operation and showed no signs of internal issues related to its collegiality concept.

4.4.2 Data collection

The data collection for this work involved a merger of my own data (related to EcuadOrg) with external data from one of my supervisors (related to ScotOrg) who had no further use for that data. After an initial conversation about our independent research on social enterprise governance in Scotland and Ecuador, followed by a detailed review of the data, I noticed that we both had one empirical case of an apparently collegially-governed social enterprise. In particular, the Scottish case study of my supervisor had several commonalities with one of multiple other organizations from which I had collected data in Ecuador. Thus, I combined the data of ScotOrg and EcuadOrg to further explore the governance approaches of the two social enterprises. The main sources of data were interviews, followed by participant and non-participant observations, as well as secondary data from internal and external documents. A total of 17 semi-structured interviews were conducted with an average length of 53 minutes. The interviewees comprised the founders, employees, and external board members of the two hybrid organizations. All interviews were audio-recorded and transcribed verbatim.

At ScotOrg, my supervisor had accompanied the full organizational journey of the firm from its inception in 2016 until its demise in 2019. During this time, her participant and non-participant observations involved the presence in seven important board meetings as well as her active support for the creation of ScotOrg's annual social impact report. Her continuous organizational involvement was important to get a holistic understanding of the governance dynamics at ScotOrg and to gain the trust of ScotOrg's individual members in order to conduct six personal interviews with all decision-makers of the hybrid organization. However, to clarify and enrich the insights from one important organizational member of ScotOrg, I conducted one additional follow-up interview.

At EcuadOrg, data collection was carried out by me. As part of the larger research project for this thesis, I undertook four visits to the country with a total length of 20 weeks between 2016 and 2019, of which I volunteered for six weeks at EcuadOrg. Throughout this time, I was in frequent contact with the organizational members of EcuadOrg and conducted ten personal interviews in relation to the

governance concept of the organization. Additional participant and non-participant observations involved the presence at internal company meetings and workshops of the organization and helped to get a deeper understanding of the governance regime at EcuadOrg.

For both companies, the primary data was triangulated with internal and external secondary data comprising newspaper articles, press releases, company reports, legal documents, organigrams, as well as LinkedIn profiles of the organizational members of both organizations. Table 3 provides an overview of the data sources.

Table 3: Data overview for Paper 2

Data Sources		**ScotOrg**	**EcuadOrg**
Primary Data	Interviews	7 Interviews with 6 individuals (394 minutes)	10 Interviews with 7 individuals (505 minutes)
	Participant and non-participant observations	44 pages of field notes and meeting minutes from participant and non-participant observations	31 pages of field notes and meeting minutes from participant and non-participant observations
Secondary Data	Internal Documents	56 pages of internal documents (social impact report, legal documents, organigrams, business model documentation)	45 pages of internal documents (annual report, legal documents, business plans, organigrams)
	External Documents	34 pages of external documents (newspaper articles and press releases, LinkedIn profiles of the key people)	52 pages of external documents (newspaper articles and press releases, LinkedIn profiles of the key people)

4.4.3 Data analysis

The data analysis is based on exploitative abductive reasoning (Bamberger, 2018) that involved the systematic identification of recurring patterns in the data, followed by an analytic process that matched them with an existing conceptual framework that provided the best explanation for the phenomenon under study, in order to facilitate further theorizing for the discussion. To explore whether and how collegiality *may be* a promising governance concept for hybrid organizations, I applied a systematic combining approach (Dubois & Gadde, 2002) in which I iteratively moved back and forth between the empirical data from the empirical cases, existing governance

frameworks, and the evolving theorization through an institutional logics perspective. This analytical process had three major stages.

In stage one, I created a database that allowed me to store, categorize, and structure the data about the two hybrid organizations. This gave me a thorough overview of the amount and comprehensiveness of the data as well as an initial comparative understanding of the two organizational contexts. In stage two, I juxtaposed the governance concepts of both organizations and put them in comparison with existing governance frameworks. After further studies of the existent governance literature, I followed my professional judgment and aligned the empirical cases with the collegiality concept as the most suitable theoretical framework to explain the governance approaches of EcuadOrg and ScotOrg. In stage three, I made use of NVivo software and coded the data in relation to the six major collegiality elements as outlined by Waters (1989). This was important to systematize the data observations and to identify the critical similarities and differences in the governance approaches of the two hybrid organizations.

4.5 Findings

4.5.1 The collegiality concept of ScotOrg

In the case of ScotOrg, I was intrigued by the surprising fact that the innovative hybrid enterprise failed after only three years of operation, despite having achieved impressive organizational success with fast growth, boasting a highly dedicated and experienced management team with a common goal, and not committing any organizational misconduct. Instead, the members of ScotOrg attributed the company's demise to considerable struggles with its collegiality governance concept. This, however, as my findings indicate, concerns only two of Waters' (1989) six classical collegiality elements that were outlined above.

In terms of *professional career*, all ScotOrg members demonstrated a high vocational commitment to the hybrid mission of their organization, while none of them saw the work as a contractual obligation or a means to maximize personal self-interest. Instead, all members jointly worked towards the creation of a greater societal good by supporting socially disadvantaged peoples through the means of the hybrid organization. Although ScotOrg had a clear organizational performance orientation, its profits were either reinvested into the business or distributed to the organization's

beneficiaries. The members even decided to abstain from any personal income from the business but to run it voluntarily in order to deliver a maximum of financial resources to the charitable partner of the organization.

> ***ScotOrg Member 1****: Our mission is to help people from deprived backgrounds or less fortunate backgrounds to be able to gain a start in life. … We're all relying on a different business to actually pay our wages.*
>
> ***ScotOrg Member 2****: We did £100,000 worth o' work for nothing, you know, which is what it would cost to set up a very small brand like [ScotOrg].*
>
> ***ScotOrg Member 5****: You know, I, I think if I was in a position where I didn't need to work to pay my bills and feed my children and that sort of good stuff that happens in your forties, it's the sort of thing I'd love to just do full time.*

Regarding the *theoretical knowledge* element, all ScotOrg members also had profound and complementary expertise and experience in different professions which they leveraged for the envisaged prosocial impact of their organization. While one team member was a marketing executive, one was a legal and regulatory specialist, two were beverage industry experts, and another was a social enterprise specialist.

> ***ScotOrg Member 4****: We were all kinda entrepreneurs, I suppose you would call us. We were quite used to making quick decisions and going with our gut and not having to research everything.*

While a high level of differentiated knowledge was a fundamental principle for the collegiality concept of ScotOrg and essential for the functioning of the organization, it also facilitated the *formal autonomy* of its members and allowed them to work independently in their area of expertise. However, strategic business decisions still had to be taken by the whole management committee, for which all members had to come together in a personal meeting.

> ***Interviewer****: So, who would you say runs [ScotOrg]?* ***ScotOrg Member 1****: I would say anyone, individually … But as a board, we have all guided, and all brought to the table our different facets to where we think and where we feel it should go.*

The procedure for *collective decision-making* in committee meetings at ScotOrg followed the collegial ideal of consensus, requiring all members to agree about the matter in question. It also involved prior deliberation, which is understood as "reason-giving discussions in which evidence is weighed, beliefs are shared, and preferences are changed" (Lee & Romano, 2013: 733). This approach to decision making, however, turned out to be a very time-consuming process that led to critical

internal tensions among the company members, especially since the business in the fast-moving beverage industry often required quick reactions to the dynamics of ScotOrg's organizational environment.

> ***ScotOrg Member 2****: We kind of just put it to: 'Here's an idea, what does everybody think?' And if everybody says yes then we just did it.*
>
> ***ScotOrg Member 6:*** *In a way, it was maybe pre-briefings to avoid confrontation at the meeting. So, it's maybe like 'ok, here is an idea, here is how it could work, let's chat it over' at the meeting. And then the idea is bedded in and you could understand how it works, and it's agreed.*
>
> ***ScotOrg Member 1****: I think we probably all underestimated the amount of time we would require. I think I'll probably rephrase it. It's not that we underestimated the amount of time but underestimated how difficult it would be to get a mutually overlapping time that would then allow us to continue.*
>
> ***ScotOrg Member 5****: And the fact is all five of us are too time poor to get after it properly. … I knew that I was time poor so I knew that I wouldn't be able to give it more than an hour or two round board meetings and spend some, you know, thinking time. … I'm used to very tight agendas, very tight structure especially with people that have got limited time to get stuff done in the time.*

In terms of *formal egalitarianism*, the team at ScotOrg decided to run the hybrid enterprise as the collegial ideal of a 'company of equals' (Freidson & Rhea, 1963; Parsons, 1956), in which none of the members was subordinate to another. This equally shared control was a new situation for all individuals involved and quickly led to internal confusion and further inter-personal tensions.

> ***ScotOrg Member 5****: We thought that that separation of powers and responsibilities was kinda good thing to do, governance-wise. … It felt like a coming together of kind of equals with different skillsets. … So, I don't know why it never really occurred to me early doors, you know. But somebody needs to be the boss here.*
>
> ***ScotOrg Member 6****: I think it is good to have a flat hierarchy, but you need to have someone in charge.*

With reference to the *scrutiny of product* element, ScotOrg abstained from the implementation of a formal external supervisory board, as it was also not required by the legal CIC structure of the company. Instead, all members represented both the management body and the supervisory board of the company at the same time, while personal committee meetings were utilized as the major informal control instrument. Although the company had established an external advisory panel, its role was limited to the effective selection of suitable beneficiaries. In this sense, ScotOrg also abstained from a formal control mechanism.

Once the members of ScotOrg started to recognize and discuss their intra-organizational issues with some elements of their collegiality concept, interpersonal tensions had already become unsurmountable and forced the company to shut down operations in summer 2019, followed by official dissolution in 2020.

> ***ScotOrg Member 2****: The next move for [ScotOrg] is to try to make sure it ends up in like-minded people's hands who have more time. … And hope that it never ends up in a greedy person's hand. Because that would be a disaster.*
>
> ***ScotOrg Member 5****: I think there's a lot to be proud of. I don't think there's anything to be unproud of. I just, it's just…lost momentum … lack of consensus or a significant difference in opinion across the board … and time.*

In sum, the governance approach of ScotOrg complied with all six theoretical elements of the collegiality concept. In practice, however, the two collegial elements of formal egalitarianism and collective decision-making by consensus turned out to be a major source of internal organizational tensions at ScotOrg.

4.5.2 The collegiality concept of EcuadOrg

In comparison to ScotOrg, EcuadOrg implemented a similar, yet slightly different collegiality concept which turned out to be highly beneficial for the company. In terms of the *professional career* element, the organizational members of EcuadOrg also demonstrated a strong sense of personal commitment to their work, just like people at ScotOrg. In contrast to organizations dominated by a rational-bureaucratic logic, in which individuals tend to alienate themselves from their work, people at EcuadOrg reported a feeling of high meaningfulness that they gained from their non-routinized operations and strongly identified themselves with the hybrid mission of their organization and its alternative ways of doing things.

> ***EcuadOrg Member 6****: I love what I do, and I love what my organization does. Obviously, a percentage of me is obligated to work, because I have to survive. But in general, it's a passion.*
>
> ***EcuadOrg Member 2****: I think we are more open to trying new things. And we know there are other ways to work. And we've seen it. And we had it as an experience for ourselves.*
>
> ***EcuadOrg Member 1:*** *My experience in the NGO sector in the Amazon has led me to be very, very critical of organizations that are doing, in my opinion, not very good work. Much useless work, actually. Trying to save the Amazon while the work is not actually leading to any real change. That kind of installed in me kind of a principle to always look for the best system. Always look for a system that is going to lead to a sustainable change.*

With regard to the *theoretical knowledge* element, the members of EcuadOrg also demonstrated a high degree of specialization in different subject areas such as education, accounting, agriculture, forest management, or social development work, which was used and applied for the benefit of the indigenous beneficiaries of the organization. The members of EcuadOrg furthermore placed a high emphasis on the continuous development of their knowledge resources through advanced training activities. Each organizational member can freely choose training in two activities per year that they regard as personally valuable for themselves and their work.

> ***EcuadOrg Member 2****: I would say each person's role is pretty specialized. … I would definitely give everyone credit for you know carrying out their personal responsibilities in their areas of specialization.*
>
> ***EcuadOrg Member 6****: We all bring something different to the table. … We have a policy at [EcuadOrg] that we can do two trainings a year of our liking.*
>
> ***EcuadOrg Member 4****: There are many opportunities to train yourself, to implement your idea, to start some initiatives.*
>
> ***EcuadOrg Member 5****: I was also training myself, and now I am studying for accounting.*

Like ScotOrg, EcuadOrg also put high importance on a polycratic dispersion of power through which high degrees of *formal autonomy* were enjoyed by all organizational members, depending on their individual expertise and experience in a particular subject area. This was particularly evident in all sorts of projects that organizational members initiated, created, and implemented independently, ideally after consulting with the group in weekly meetings.

> ***EcuadOrg Member 1****: It's veeery important that everybody needs to feel quite inspired and self-motivated to work hard and to do the best they can. And with a strictly top-down mechanism that's very difficult to achieve.*
>
> ***EcuadOrg Member 2****: Definitely, everybody is responsible for their own work in their own area.*
>
> ***EcuadOrg Member 3****: We want everybody to be the owners of what they are doing and see their colleagues as people who are gonna help them get there.*

The weekly team meetings at EcuadOrg were also an ideal space for *collective decision making*. Although the members of EcuadOrg, like ScotOrg, generally aimed for consensus in their decision-making procedures this collegial ideal was often replaced by consent as a more time-efficient approach. Contrary to consensus, consent did not require the favorable agreement of all members to a certain proposal, but at least their toleration through the absence of an objection. This mechanism also

seemed fairer to them than a democratic voting procedure, from which they abstained completely. However, since the members of EcuadOrg had organized most of their work in autonomously led projects, time-consuming collective deliberations were also less frequent, as opposed to ScotOrg.

> ***EcuadOrg Member 3****: We never had a thing where we had to vote or something. … It is more by the absence of objection. Since it is in spaces where we are analyzing together, we come to conclusions together.*
>
> ***EcuadOrg Member 6****: There are not many decisions that we have to make as a group. There are a lot of decisions that are just very project-specific. … So, group decisions are a lot by consensus and I would also say lack of objection. … I don't think we have ever voted. We definitively don't vote.*

In terms of *formal egalitarianism*, EcuadOrg also reduced the elements of hierarchy and status inherent in a bureaucratic logic as much as possible. In contrast to ScotOrg, however, the company did not see much value in Parsons' (1956) collegiality conception of 'a company of equals' either, particularly because of the heterogeneous social and professional backgrounds of its members and their different knowledge levels. Formally, the legal structure of EcuadOrg also required EcuadOrg Member 1 to be the legal representative of the company, which gave him formal authority but also demanded high responsibility. Consequently, his remuneration was agreed to be slightly higher than that of his other colleagues. Informally, however, EcuadOrg followed a very decentralized structure in which hierarchy was highly project-dependent and internally negotiated by the project team members, instead of being imposed onto them.

> ***EcuadOrg Member 1****: Not everybody is equal. Not everybody has the same educational background, nobody has the same skills and capacities. I am a little bit hesitant about thinking that everybody is equal. But I think everybody should have the opportunity to grow and develop. That for me is vital.*
>
> ***EcuadOrg Member 3****: There are subjects where there is like a hierarchy that gets in place when it's about money or hiring. But in the day to day life, we are all just working together to make things happen.*

In terms of *scrutiny of product*, EcuadOrg is legally required to have a supervisory board. Although the board has the formal authority to actively intervene in EcuadOrg's management, it is informally used as a passive advisory resource that brings further expertise and knowledge to the table and supports EcuadOrg in critical situations. Additionally, EcuadOrg's workforce conducts frequent peer evaluations and relies on an internal management system as another informal control mechanism.

***EcuadOrg Member 1**: I am not a fan of top-down governance mechanisms. … So, it is definitely more consulting with the board. … The people who know best about most things are me and my team. The board is more of an advisory capacity. And should things start to go seriously wrong, then the board has the authority to take action.*

***EcuadOrg Member 3**: What we are calling the MELA is the monitoring, evaluation, learning, and adaptation system. So, we want all the information that we are actually gathering on a daily basis in the meetings. … And that tells us how we grow and how we adapt.*

***EcuadOrg Member 6**: We all have a weekly meeting together. Everybody knows what's going on with everybody. … Three times a year we do an evaluation session, and a self-evaluation. Each of us.*

EcuadOrg is continuously experimenting with further intra-organizational improvements under its polycratic governance logic. So far, the company considers its collegiality concept as successful and has experienced no critical drawbacks like ScotOrg. By comparing the governance approaches of EcuadOrg and ScotOrg (see Table 4), I found that the traditional collegiality elements of professional career, theoretical knowledge, formal autonomy, and scrutiny of product were generally conducive for collegiality to work in the empirical context of the two significantly heterogeneous hybrid organizations. Formal egalitarianism and decision-making by consensus, however, turned out to be two particularly critical elements that suggest the development of a neo-collegial approach in which the respective elements are transformed.

Table 4: Collegiality approaches at ScotOrg and EcuadOrg in comparison

Collegiality characteristics	**Integrated at ScotOrg?**	**Functioning at ScotOrg?**	**Integrated at EcuadOrg?**	**Functioning at EcuadOrg?**
Professional career	Yes	Yes	Yes	Yes
Theoretical knowledge	Yes	Yes	Yes	Yes
Formal autonomy	Yes	Yes	Yes	Yes
Scrutiny of product	Yes	Yes	Yes	Yes
Formal egalitarianism	Yes	No	No	A project-based hierarchy functioned as an alternative
Decision-making by consensus	Yes	No	No	Decision-making by consent functioned as an alternative

4.6 Discussion

In recent years, there has been a rapid expansion of hybrid organizations that follow post-bureaucratic principles by combining social and economic approaches to societal value creation at the very heart of their mission. Examples include a broad array of organizational constructs such as social enterprises, network organizations, community enterprises, or cooperatives, that compromise on instrumental economic rationality in favor of more holistic, participatory, and value-oriented ways of organization. In line with this development, one can also observe new organizational governance dynamics that foster the macro-level erosion of the iron cage of institutionalized capitalism and the rise of alternative forms of organizing. The inadequacy of traditional governance concepts for the challenges of hybrid organizations in contemporary society, about which there is broad agreement among organizational scholars (Battilana et al., 2018; Bruneel et al., 2016; Filatotchev et al., 2020; Mair et al., 2015; Wolf & Mair, 2019), provides another accelerating impetus in this direction. In Weberian terms, there is growing evidence of a disenchantment of rational-bureaucratic governance regimes, an enchantment of novel and innovative governance concepts, as well as a re-enchantment of previously existent but marginalized approaches to organizational governance. Collegiality, as part of the latter, represents one example of a polycratic governance concept that has been largely overlooked in the organizational context. However, the concept of collegiality originated in the political sphere, where organizational activities are subject to a number of different constraints and imperatives from those binding in the context of business organizations as distinct political communities. Therefore, organizational actors will have to make certain adaptations to successfully govern their business under a collegiate regime. This is particularly important for hybrid organizations, which are significantly different from other organizational constructs like universities, courts, or religious institutions, in which collegiality has had a long empirical history. In the following section, I therefore propose a neo-collegial conceptualization for the particular context of hybrid enterprises.

4.6.1 A neo-collegial governance approach for hybrid organizations

Based on the research at ScotOrg and EcuadOrg, I argue that collegiality can represent a viable concept for the polycratic governance of hybrid enterprises, but also for other types of post-bureaucratic organizations. Although collegiality is

theoretically opposite to bureaucracy, transformative organizing for social change will likely require a certain combination of the two political ideal types (Lazega, 2020), while the manifestation of this combination will depend on the type, structure, and context of the organization where it is applied. Moreover, collegiality must not be understood as an anti-bureaucratic ideal since it is still a performance-oriented form of governance (Waters, 1989). This notion of performance, however, is not primarily coupled with instrumental rationality and economic efficiency, as in the case of bureaucratic organizations. Instead, collegiality embraces performance in broader terms and puts a higher emphasis on a value-rationality that embraces an interpersonal collective as well as non-routine ways of organizing with a polycratic dispersion of power. Examples of the performance orientation of collegiate hybrid organizations might include enhanced societal wellbeing, increased social inclusion, or reduced environmental degradation. However, for collegiality to function effectively, my findings suggest that only four of the six classical collegiality elements outlined by Waters (1989) should be directly transferred to the context of hybrid organizations, while the other two elements will require alternative approaches for the following reasons.

Professional career is one important collegiality element that implies the personal identification of an individual with their work instead of their alienation from it. Contrary to a job or an occupation that is focused on little more than economic income and personal subsistence (Wrzesniewski et al., 1997), a professional career involves a vocational commitment or a calling to suprapersonal norms (Waters, 1989). In the context of hybrid organizations, the primary overarching norm is the generation of social value for the benefit of others, followed by the generation of economic value as a source of personal income and organizational survival. For many individuals, making a positive impact in the life of others is particularly important to experience their work as meaningful (Grant, 2007; Michaelson et al., 2014). In turn, feelings of meaningfulness, zest, and passion are positively associated with personal work and life satisfaction (Peterson et al., 2009) as well as firm performance (Cardon et al., 2009; Mueller et al., 2017) although they can also become a personal burden (Bunderson & Thompson, 2009). Hybrid organizations that wish to successfully govern themselves in accordance with a collegiality concept might therefore want to select those individuals as their organizational members who identify with the social

logics of the venture, rather than individuals who are primarily driven by a quest for power, status, and economic rents. However, it should be considered that even for those individuals who demonstrate an explicit commitment to polycratic modes of operation, its daily practice can easily become challenging when members still carry identity imprints from former occupations that were dominated by capitalist and hierarchical market logics (King & Land, 2018). Notably, "[a]fter two centuries of Western bureaucratization of the world, [even] a collegial organization is more or less bureaucratic, depending on how it is managed" (Lazega, 2020: 17). Younger generations might consequently be in the most promising position to establish polycratic organizational regimes and construct alternative, post-bureaucratic institutional settings.

Theoretical knowledge is another essential collegiality element, since collegiate organizations are fundamentally driven by knowledge resources (Courpasson & Clegg, 2012) that are differentiated among organizational members and applied for the benefit of less-knowledgeable and more vulnerable individuals (Waters, 1989). For hybrid organizations, this particularly resonates with their work for and with less powerful beneficiaries whose destiny is often significantly influenced by the skillful and context-sensitive application of the knowledge of the members of the hybrid organization. Collegially oriented hybrid organizations, I argue, will have to make collective knowledge management a core organizational principle and be willing to share and apply it internally and externally in order to innovate and to enhance their social and economic organizational performance. However, prevalent tools and mechanisms for organizational knowledge transfer often stand in stark contrast to ideals of collegiality and call for alternative solutions in hybrid organizations. This concerns, for example, the widely established application of templates as working examples for the replication of productive knowledge and organizational routines (Szulanski & Jensen, 2004; Winter et al., 2012). The use of templates implies an intensification of organizational isomorphism and impersonal bureaucratic routines while it prevents creative knowledge creation and first-principle thinking as important prerequisites for transformational change and innovation. For collegial organizations, I argue that a major focus on the establishment and nurturing of a knowledge-sharing culture conducive to inter-personal communication and collaborative exchange is needed, while impersonal knowledge management platforms, templates and

repositories should rather play a supporting, secondary role. Since “knowledge has a tacit dimension that cannot be transmitted through codification”, but through interpersonal learning (Miller et al., 2006: 709), the collaborative nature of collegiality-governed organizations provides a promising context for the effective production of knowledge and innovation.

Formal autonomy, as a third important collegiality element, is highly dependent on the knowledge levels of organizational members. The higher the knowledge of organizational members, the better they will be able to work independently without the need for personal control or supervision, which also reduces the amount of consensual decision-making procedures required. Furthermore, high levels of autonomy will help organizational actors to break free from bureaucratic authority and disrupt the status quo of an existing social order to create new possibilities for social innovation and societal change (Haugh & Talwar, 2016; Rindova et al., 2009). To achieve this, hybrid organizations can create autonomous spaces by organizing its members in self-managed teams and projects (Kokkinidis, 2015) in order to free themselves from bureaucratic micromanagement and hierarchical control mechanisms. Based on Peter Drucker’s classical concept of management by objectives and self-control, in which he presumes “that people want to be responsible, want to contribute, want to achieve” (1974: 348), autonomy-giving governance and management principles have revived in recent years and found application in thousands of organizations that seek to flatten their hierarchies. Among the most popular practice frameworks embracing individual and collective self-management are Holacracy (Robertson, 2015), Teal organizations (Laloux, 2014), Podularity (Gray & Vander Wal, 2012), Sociocracy 3.0 (Priest et al., 2022), and Beta organizations (Hermann & Pflaeging, 2018). What these frameworks have in common is a decentralization of power from a small group of individuals to all organizational members. However, to prevent organizational anarchy, they must still rely on specific rules and routines for self-organization which implies the necessity of a certain level of bureaucracy to remain.

Collective decision-making, as a fourth essential collegiality element*,* implies that collegiate organizations establish collective forums in which decisions are ideally made by consensus (Waters, 1989). The advantage for post-bureaucratic organizations is that “consensus-based decision-making models encourage the

development of more inclusive models of participation and the construction of rule-creating rather than rule-following individuals" (Kokkinidis, 2015: 849). However, my findings show that the quest for consensus in deliberative procedures is also a time-consuming process that might be regarded as unsuitable by many organizations, especially when frequent collective forums are required, or operations take place in a fast-moving industry. As highlighted by Lazega (2020: 12) "very rarely do committees agree easily - if at all – on the criteria that should have priority. Moreover, consensus might be difficult to achieve when a high number of stakeholders is involved and the business network become more opaque (Reypens et al., 2021a). For hybrid enterprises, in particular, the pace of decision-making has been highlighted as an essential requirement to keep abreast with constant changes and uncertainties in their organizational environment (Dorado & Shaffer, 2011: 45). Therefore, collegiality-oriented hybrids might want to integrate elements from other collective decision-making alternatives such as organizational democracy, agonistic pluralism, or decision-making by the absence of objection.

Different forms of democratic decision-making have already become a promising principle for many post-bureaucratic organizations (Cheney et al., 2014; Johnson, 2006; Kokkinidis, 2015), and have been advocated by several organizational scholars under consideration of certain organizational and institutional conditions (Battilana et al., 2018; Courpasson & Dany, 2003; Hielscher et al., 2014; Landemore & Ferreras, 2016). However, the limits of democratic decision-making in the organizational context were also clearly highlighted (Kerr, 2004), particularly by pointing to the ignorance of deliberative democracy to reflect interpersonal conflicts (Mouffe, 2000), and by emphasizing the inadequacy of democratic voting procedures to consider the expression of diverse values (Battilana et al., 2018). The concept of agonistic pluralism (Mouffe, 1999, 2000) on the other hand, integrates both deliberative democracy and consensus by combining a basic level of agreement among organizational members with the right to defend their own views and ideas (Kokkinidis, 2015). Similarly, the concept of collective decision-making by the absence of objection, as applied by EcuadOrg, substitutes consensus with consent. This approach is also embraced by Teal organizations (Laloux, 2014) and Holacracy organizations (Robertson, 2015; Schell & Bischof, 2021). Although an absence of objection approach can also involve deliberation, the difference to consensus

decision-making is that not every organizational member has to agree to a proposal, which will be adopted if they can merely tolerate it (Robledo, 2020), allowing agreements to be reached in a faster way. For a collegiality concept to work in hybrid organizations, organizational members have to carefully evaluate which approach corresponds best to their expectations from a collective forum and the average speed required to reach agreements and to make thoughtful decisions.

Formal egalitarianism marks a fifth important element for a functioning collegiality concept, particularly since contemporary organizations and their practices continue to represent a major source for the reproduction of social and economic inequality not only for broader society outside organizational boundaries (Amis et al., 2018; Bapuji et al., 2020) but also for individuals within the workplace (Amis et al., 2020; Stainback et al., 2010). In response, some post-bureaucratic organizations have made a radical shift towards striving for maximum workplace equality, e.g. by formally declaring equal power policies, equal remuneration schemes, and equal decision-making rights (Kokkinidis, 2015; Laloux, 2014). However, since collegiate organizations are also performance-oriented systems, even if not in a primarily economic sense, Waters (1989: 957) emphasized that “it is extremely unlikely that any group of its members will be exactly equal”. Elements of formal authority are therefore not uncommon in collegiate organizations and might involve at least the designation of a *primus inter pares* as the first among equals (Greenwood et al., 1990; Waters, 1989). As hierarchies are generally knowledge-dependent in collegiate organizations (Courpasson & Clegg, 2012) they might be re-negotiated from project to project, or from client to client, as in the case of EcuadOrg. For a functioning collegiality concept, organizational members must carefully evaluate the right balance between the maximum equality possible and the minimum hierarchy necessary.

Scrutiny of product in terms of peer evaluation and informal control is another central tenet of collegiality that works as a protection mechanism for internal and external stakeholders “by ensuring that individual professionals are policed by colleagues” (Waters, 1989: 965). For hybrid enterprises, one critical instrument in this regard is the board of directors (Bruneel et al., 2020). Although some legal structures adopted by hybrid organizations constrain their freedom of informal control by requiring the presence of a board as a formal monitoring instrument whose official responsibility is to use its given authority to make sure that the managerial body is

acting in the best interest of the organization's stakeholders, organizational members can still negotiate informal agreements about the internal role of the board (e.g. as an advisory capacity), as in the case of EcuadOrg. However, to avoid potential conflict if informal agreements fail, collegially-oriented hybrid organizations might prefer to choose a legal structure that provides the greatest freedom for the selection of voluntary control instruments. Additionally, a stewardship approach to intra-organizational governance, in which the board is regarded as a support and empowerment instrument for organizational members to achieve hybrid organizational goals, rather than a surveillance instrument as in the view of agency theory (Mair et al., 2020), is well aligned with the collegiality concept. Furthermore, collegiate organizations must ensure the implementation of a robust internal peer-evaluation system that provides further collective feedback and support from and for all organizational members.

In summary, there is ample empirical evidence for a growing disenchantment of the bureaucratic logic that underpins the capitalist system as well as for the enchantment and re-enchantment of alternative concepts (Suddaby et al., 2017). Hybrid organizations represent a rapidly growing counterweight to rational-bureaucratic organizations, as they do not regard maximum economic efficiency as a central requirement for social innovation and the advancement of postmodern society. This institutional shift also provides new opportunities for the re-enchantment of collegiality as a potentially suitable polycratic governance concept for hybrid organizations. However, to successfully transfer the collegiality concept from the political sphere to the organizational context, hybrid organizations will have to make certain adaptations to effectively revitalize it for their governance and management systems, in particular by considering formal egalitarianism and decision-making by consensus, which this study regards as the two most critical of its six major elements in the context of hybrid organizations. Notably, collegiality must not be understood as an anti-bureaucratic ideal, but as one end of a governing continuum on which organizations can position themselves, with bureaucracy on the other end (Lazega, 2020). As this paper suggests, hybrid organizations must situate themselves predominantly on the collegiality side in order to fulfil their primarily social mission for societal change and innovation.

4.6.2 Limitations and suggestions for future research

This research is not without limitations. In this paper, I have focussed particularly on two social enterprises as hybrid organizations that Waters (1989: 959) describes as *exclusively collegiate organizations,* which are typically "private and small-scale organizations in which internal coordination is completely achievable by consensus established on a face-to-face basis between participants". Further collegiality research would benefit from explorations in medium-sized and large organizations as well as other types of hybrid, collective, and post-growth organizations. As the two organizations of this study followed a collegiality concept right from their inception, it would be of great interest to explore how bureaucratically governed companies can make the successful transition to become collegially-governed organizations. A promising starting point is provided by the research of Aguilera et al. (2018: 87), which explored "why, when, and how a firm adopts governance practices that do not conform to the dominant governance logic". Additionally, I call for future research to integrate the broader micro and macro-level influences that collegiate organizations must deal with. On the micro-level, this particularly points to the social identity of the organizational members who represent the collegiate organization. As most organizations are still governed by a rational-bureaucratic logic, how can individuals successfully become integrated into a collegially governed organization, and what are the major challenges they need to overcome? Previous research has identified that a psychological effort to achieve a higher social status ordering is conducive for hierarchies but detrimental for collegial organizations (Gruenfeld & Tiedens, 2010; Pfeffer, 2013). Conversely, the question arises whether collegiality would stringently require individuals whose self-image and behavior are already aligned with collegiate principles when joining organizations. On the macro-level, governance practices were also highlighted as being considerably influenced by national governance logics (Aguilera & Jackson, 2003; La Porta et al., 2000), even though many organizations demonstrate an agency that succeeds in implementing non-conforming governance practices irrespective of national-level institutions (Aguilera et al., 2018; Bednar et al., 2015). Further investigations in individualistic and collectivistic societies that focus on the interplay between firm-level collegiality and national governance ideals in different geographical locations might therefore represent another promising direction for future collegiality research. Finally, a multi-level perspective on the interplay between collegiality and bureaucracy, as developed by Lazega (2020), would be desirable in

the context of hybrid enterprises to explore “which combination of bureaucracy and collegiality, and at what level of analysis, creates, maintains, or de-institutionalizes organizations and their effects” (Thornton, 2021). In this regard, the polycentricity framework of Elinor and Vincent Ostrom might represent another promising direction, since it represents a form of governance that seeks to protect the integrity and autonomy of multiple centres of decision making by balancing centralized and decentralized governance mechanisms on micro, meso, and macro levels of organization (Carlisle & Gruby, 2019).

In the particular context of this thesis, I also want to point to the relatively sparse amount of empirical data that resulted from the 17 interviews among the members of the two selected case organizations ScotOrg and EcuadOrg as another limitation. A richer empirical foundation is regarded as desirable to further strengthen the theorization in relation to the collegiality concept. However, since all employees of the two very small organizations were interviewed already, and ScotOrg does not exist anymore, additional data collection from other collegiality-governed organizations in various contexts will be beneficial to confirm the preliminary hunches from this paper. There might also be various alternative explanations for the success or failure of collegiality at ScotOrg that the current data basis does not permit to confirm. For example, the fact that all members of ScotOrg governed the organization voluntarily while relying on financial income from their work in other, non-collegial companies might have resulted in a lack of commitment to invest more time and energy to maintain and develop their collegiality governance concept. In this regard, a longitudinal study among other collegial organizations would allow for a process perspective that might help to better understand the intra-organizational dynamics that facilitate or impede a long-term implementation of collegiality governance.

In general, the concept of collegiality governance deserves more empirical and theoretical advancement, particularly in relation to the pervasive and often taken for granted assumption of bureaucracy as a universal approach to governance and organisational decision-making. This paper is a steppingstone that hopefully inspires future research to make new inroads towards collegiality as a potential alternative for the governance of post-bureaucratic organizations.

4.7 Conclusion

Given the urgent need for a radical shift of the world's contemporary economic system away from an exclusive focus on economic efficiency and growth addictions towards alternative ways of organizing for a post-growth era (Banerjee et al., 2020), hybrid organizations already represent an intermediary step in this direction. By blending a commercial logic with a social logic, hybrid organizations follow a post-bureaucratic organizational design that requires appropriate governance mechanisms that deviate from the dominant logic of rational-bureaucratic organizing. In this paper, I have empirically explored the re-enchantment of the polycratic Weberian ideal of collegiality as a potential option for the intra-organizational governance of hybrid organizations. As a participatory and knowledge-based form of governance that embraces the collective, collegiality can offer a promising opportunity for post-bureaucratic hybrids if organizational members are able to adequately adapt and integrate its six major elements as discussed in this paper.

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5 An institutional nexus perspective of social entrepreneurship (Paper 3)

5.1 Abstract

In this paper, I contribute to the nascent field of transnational social entrepreneurship by developing an institutional nexus perspective that links the previously developed institutional void and institutional support perspectives of social entrepreneurship by introducing transnationally embedded social entrepreneurs as bridging agents between different institutional environments. Since existing research on transnational and migrant entrepreneurship has neglected a number of important migration directions, theoretical development remains considerably limited, necessitating a better understanding of the role of context-spanning migration at the intersection of transnational and social entrepreneurship. In this paper, I address these shortcomings and provide a contextualized framework to predict how the different migration directions of transnational entrepreneurs, under further consideration of varying human capital endowments, may facilitate or constrain their social entrepreneurship abilities in different institutional contexts. The paper concludes with a discussion of the implications of my work and provides suggestions for future research to test and advance the theory.

5.2 Introduction

Transnational social entrepreneurship has recently emerged as a promising research direction at the intersection of transnational entrepreneurship and social entrepreneurship that deals with migrant entrepreneurs who leverage their simultaneous social embeddedness in different countries for the benefit of their social venture (Bolzani et al., 2020). In contrast to non-transnational entrepreneurs, who typically have to invest a considerable amount of time and effort to familiarize themselves with the socioeconomic institutions of the host country in order to produce context-sensitive outcomes (Zahra et al., 2009), transnational entrepreneurs already possess a social embeddedness in the institutional contexts of both home and host countries (Drori et al., 2009). Their transnationality results, for example, from a bi-national social background, or previous work, education, and living experiences in both the home and host countries, and suggests the increased ability of transnational entrepreneurs to substitute for weak or absent institutions (i.e., institutional voids) in one country with the supportive institutions of another country (de Silva, 2015; Riddle et al., 2010). However, researchers attempting to explain which national contexts are better or worse in facilitating social entrepreneurship activity have argued either in favor of institutional support contexts or institutional void contexts (Stephan et al., 2015), while a transnational embeddedness has not been considered yet. This calls for an institutional nexus perspective that extends and connects the institutional support and the institutional void perspectives of social entrepreneurship.

The institutional support perspective ascribes more favorable conditions for social entrepreneurship to contexts with high institutional quality (Chen et al., 2018; Estrin et al., 2013; Stephan et al., 2015). This includes, for example, a strong rule of law (Estrin et al., 2016), active governmental support (Korosec & Berman, 2006; Stephan et al., 2015), high human capital levels (Estrin et al., 2016), and a substantial provisioning of property rights protection (Estrin et al., 2013). Such market-supporting institutional conditions predominantly exist in developed economies (Khanna & Palepu, 1997; Peng, 2003) rather than less developed economies, where a comparatively stronger presence of institutional voids can significantly increase the costs of servicing disadvantaged groups of society (Ault & Spicer, 2009; Mair et al., 2012). The more costly and challenging it becomes for social entrepreneurs to serve those in need, the more likely they are to drift into directing their operations towards

wealthier clients over time (Ault, 2016), who are primarily found in more developed market economies.

In contrast to the institutional support perspective, proponents of the institutional void perspective argue that social entrepreneurship is more likely to flourish in contexts that are characterized by a lack of institutional quality (Dacin et al., 2010; Haugh, 2005), since the absence of an adequate public welfare system, resource scarcity, as well as the presence of sociocultural and environmental problems create a higher demand for social entrepreneurship (Dacin et al., 2010; Estrin et al., 2013; Zahra et al., 2009). Moreover, many social entrepreneurs actively seek deprived environments for their ventures, due to the challenges and rewards of accomplishing important social goals (Austin et al., 2006; Seelos & Mair, 2005a) or simply because of xenophilic traits (Tucker & Croom, 2021). However, while local social entrepreneurs in institutional void contexts often lack the resources and the institutional support to develop effective solutions to social problems (Bhatt et al., 2019; Zahra et al., 2009), many foreign social entrepreneurs who arrive from an institutional support context frequently struggle or fail because they are unable to translate their social ideas and concepts across institutional contexts with significantly different socio-cultural conditions (Claus et al., 2021) or because they blindly impose incongruent foreign ideals onto their beneficiaries (Shantz et al., 2018). Additionally, they often lack the coping skills required to deal with underdeveloped or absent institutions in an institutional void context (Chen et al., 2018; Zahra et al., 2009). This points to the comparative advantage of transnational social entrepreneurs who are familiar with the institutional environment in the home and host country, due to their hybrid social embeddedness in both contexts (Bolzani et al., 2020).

Previous scholarship has acknowledged the considerable heterogeneity that exists among transnational entrepreneurs (Sequeira et al., 2009; Terjesen & Elam, 2009) and broadly categorized them as either opportunity-driven or necessity-driven individuals (de Silva, 2015). However, existing research has focused almost entirely on transnationals from less developed economies who either migrated to developed countries (e.g. Al Ariss & Syed, 2011; Drori et al., 2009; Patel & Terjesen, 2011; Portes et al., 2002; Riddle et al., 2010; Stoyanov et al., 2016) or returned from developed economies to their home country in the developing world (e.g. Guarnizo, 1997; Kenney et al., 2013; Pruthi, 2014). In contrast, other migration directions from

different countries of origin remain largely underexplored and undertheorized. In times of increasing globalization, this marks a key variation and a critical research gap, the filling of which can lead to important insights to enhance the theoretical understanding of different types of transnational migrant entrepreneurs and their potential to drive social change.

In this paper, I seek to advance theory in the nascent field of transnational social entrepreneurship by addressing the research question of *how the migration directions and human capital endowments of transnationally embedded individuals influence their ability to drive social change across different institutional contexts*. By applying institutional theory (North, 1990; Scott, 1995), I develop a contextualized framework of transnational social entrepreneurship from an institutional nexus perspective, considering four different migration directions of transnational social entrepreneurs (TSEs) in combination with high and low human capital endowments to theorize on their ability to drive social change as institutional bridging agents.

The paper makes three important contributions. First, it contributes to the social entrepreneurship literature by introducing an institutional nexus perspective that links and extends the institutional void and institutional support perspectives of social entrepreneurship. It thereby addresses "the need for more attention to the institutional environment in which social entrepreneurship takes place" (Bhatt et al., 2019: 606) and responds to calls for further research on the strategies and means that social entrepreneurs use to deal with complex institutional contexts (Ault, 2016; Bylund & McCaffrey, 2017; Dacin et al., 2010; Sutter et al., 2019). Second, it contributes to the transnational entrepreneurship literature by addressing "the dynamics of highly diversified transnational entrepreneur activity" (Terjesen & Elam, 2009: 1116) and the role of human capital for immigrant/transnational entrepreneurs in different geographical contexts (Terjesen et al., 2016). Third, it advances the nascent field of transnational social entrepreneurship (Bolzani et al., 2020) by developing a contextualized framework under consideration of the different migration directions and human capital levels of TSEs. This allows for exploring whether some transnational entrepreneurs are better able than others to address societal problems based on variations in their structural embeddedness and their individual agency.

5.3 Social entrepreneurship in complex institutional settings

Several scholars have highlighted the significant impact that institutional conditions have on entrepreneurial activities (e.g. Aidis et al., 2008; Chowdhury et al., 2019; Khoury & Prasad, 2016; Zahra et al., 2005) and social entrepreneurship in particular (e.g. Ault, 2016; Dorado & Ventresca, 2013; Nicholls, 2010; Townsend & Hart, 2008; Urbano et al., 2010). Institutions are described by North (1990: 3) as "the humanly devised constraints that shape human interaction" and which can be divided into formal and informal institutions (North, 1990; Scott, 1995). While formal institutions consist of the formalized rules and laws that govern societal interactions, informal institutions describe the norms, values, beliefs, and attitudes that are socially acceptable in a given society (North, 1990). The presence of stable and efficacious formal and informal institutions is commonly seen as supportive for entrepreneurial activity, while the absence, weakness, or ineffectiveness of formal and/or informal institutions describes the existence of institutional voids that can pose significant constraints on the productivity of entrepreneurship in terms of efficient market participation, economic growth, and social development (Mair et al., 2012; Webb et al., 2020). This has several implications for transnational social entrepreneurship activities that often take place in contexts of institutional voids and institutional support simultaneously.

5.3.1 Social entrepreneurship in contexts of institutional voids

Institutional voids exist in both formal and informal institutions across all national contexts (Webb et al., 2020), but a lack of market-supporting (predominantly formal) institutions is particularly salient in less developed economies (Khanna & Palepu, 1997). Formal institutional voids refer, for example, to weak institutional arrangements in terms of regulatory and legal systems, government support, political and socio-economic stability, education, healthcare, technology, financing options, property rights protection, infrastructure, and general resource availability. In contrast, informal institutional voids comprise, for example, a lack of knowledge about markets, industries, laws, and regulations, or effective risk management (Moulick et al., 2019). They also refer to mistrust in social structures like family networks and further comprise insufficient coordination mechanisms for resource transactions, as well as processes of social exclusion based on gender, race, religion, or social status (Webb et al., 2020). Additionally, an unsupportive national culture and negative societal

attitudes towards certain entrepreneurial activities like social entrepreneurship represent other informal institutional shortcomings that many entrepreneurs have to deal with (Lee et al., 2020; Stephan & Uhlaner, 2010).

In general, institutional voids (both formal and informal) represent a significant barrier for social entrepreneurs (Bylund & McCaffrey, 2017; Desa, 2012; Ge et al., 2019). If formal institutions are underdeveloped, entrepreneurs face higher costs to gain formal status and risk drifting into unproductive or illegal forms of venturing (Webb et al., 2020), while the lower resource availability in contexts of formal institutional voids typically limits their ability to effectively grow and develop their ventures (Moulick et al., 2019). If informal institutions are underdeveloped, entrepreneurs might have greater difficulties recognizing opportunities and developing growth-related efforts while suffering from a comparatively lower ability to span different value and belief systems (Webb et al., 2020). In China, for example, social enterprises are significantly underrepresented not only because of a lack of legal frameworks that can support their emergence and legitimacy but also due to societal misunderstandings about the role of social enterprises, along with a general lack of values and beliefs about the importance of social goals for sustainable societal development (Bhatt et al., 2019). Thus, if both formal and informal institutions are significantly underdeveloped, it represents the most unsupportive environment for entrepreneurial activities (Khoury & Prasad, 2016; Webb et al., 2020). However, since institutional voids often lead to social exclusion and marginalization (Mair et al., 2012; Webb et al., 2020), they also represent an opportunity for some entrepreneurs (Sydow et al., 2022) who are attracted by the possibility of enhancing the wellbeing of others by filling these voids.

To deal with institutional voids, scholars have identified several coping mechanisms of entrepreneurial actors (Moulick et al., 2019; Sydow et al., 2022). In the presence of significant formal institutional voids, for example, entrepreneurial agents often utilize a stronger reliance on informal institutions (Ivy & Perényi, 2020; Puffer et al., 2010; Webb et al., 2020). This particularly includes the leverage of family and community networks as well as political ties for better resource access and opportunity discovery (Ge et al., 2019; Puffer et al., 2010; Rooks et al., 2016). However, a strong reliance on such networks can also significantly constrain the growth of entrepreneurial ventures (Arregle et al., 2015; Khavul et al., 2009; Khayesi

et al., 2014) unless entrepreneurs establish strict control mechanisms for their relatives and alters (Sydow et al., 2022). This is because family, kinship, and community networks often imply ‘redistributive obligations’ that can coerce entrepreneurs to hire unsuitable or unreliable family members, engage in unprofitable treaties of amity, provide high-risk loans, or support the wider family with resources that were originally meant for business development (Rooks et al., 2016).

As a second major coping mechanism, entrepreneurs leverage certain institutional voids to circumvent other institutional voids, e.g., by engaging in corruption (Baron et al., 2018; Chowdhury et al., 2019) or by operating in the informal economy (Khavul et al., 2009; Nason & Bothello, 2022; Webb et al., 2013). Especially in countries with inefficient regulatory institutions, corruption can ‘grease the wheels’ that impel entrepreneurial activity (Chowdhury et al., 2019; Méon & Weill, 2010), as in the case of bribing government officials to get preferential access to public resources and services (Baron et al., 2018). Similarly, informal entrepreneurship with a nonregistered business can work as a means to avoid extortion payments to criminal organizations (Mallon & Fainshmidt, 2020). However, although some illegal and informal entrepreneurial activities are legitimate in certain social contexts (Webb et al., 2009), they are often considered as harmful to productive and innovative entrepreneurship as well as social welfare creation (Anokhin & Schulze, 2009; Bruton et al., 2013; Chowdhury et al., 2018; Fredström et al., 2020). Moreover, such activities carry the risk of perpetuating institutional voids instead of filling them and therefore may not be in the interest of social entrepreneurs. However, “the lack of a strong rule of law in fragile states forces any entrepreneur that serves the poor to invest an inordinate amount of resources in staying formal” (Ault, 2016: 955). Additionally, arguments against informal entrepreneurial activities were criticized for their Western perspective that ties entrepreneurial effectiveness primarily to economic growth while it overlooks the role of inclusive types of growth that occur within informal economies and their potential for poverty alleviation and inequality reduction (Nason & Bothello, 2022).

A third major coping mechanism for entrepreneurs to overcome the constraints of institutional void contexts is bricolage (Busch & Barkema, 2021; Desa, 2012; Khoury & Prasad, 2016; Korsgaard et al., 2021; Mair & Marti, 2009; Phillips & Tracey, 2007). This refers to Levi-Strauss’s concept of ‘making do with what is at hand’ in

resource-poor environments (Baker et al., 2005: 329) by seeking cheaply available resources and combining them in new ways (Phillips & Tracey, 2007). Previous scholarship has identified bricolage as a legitimate mechanism helping social enterprises to survive in contexts of institutional voids (Desa, 2012; Hota et al., 2019) and even scale their operations across multiple resource-constrained settings through processes of replication, mindset shifts, and the transformation of undervalued resources (Busch & Barkema, 2021). However, the use of bricolage can also lead to unintended and negative consequences such as the strengthening of patron/client relationships when elite actors are integrated into the bricolage process to help disadvantaged actors to overcome institutional voids (Mair & Marti, 2009).

As a fourth major coping mechanism in contexts of institutional voids, entrepreneurs frequently leverage institutional intermediaries like microfinance institutions, business incubators and accelerators, science parks, or capacity-building organizations to acquire important resources and new skill-sets for the development of their ventures (Armanios et al., 2017; Dencker et al., 2021; Dutt et al., 2016; Goswami et al., 2018; Haugh, 2020; Mair & Marti, 2009; Mair et al., 2012; McKague et al., 2015; Sutter et al., 2017). Social entrepreneurs who lack managerial expertise, local knowledge or legitimacy might also find a solution in becoming franchisees of an established social entrepreneurship franchisor - a parent company that provides the institutional support and stability needed (Giudici et al., 2020; Tracey & Jarvis, 2007). However, the support and impact of intermediary organizations is often limited in developing countries (Cao & Shi, 2020; Sydow et al., 2022) while the purposes and intentions of social entrepreneurs might clash with specific restrictions of the intermediaries (Tracey & Jarvis, 2007).

A fifth major coping mechanism refers to institutional entrepreneurship - a concept that was introduced by DiMaggio (1988) and defined by Maguire et al. (2004: 657) as “activities of actors who have an interest in particular institutional arrangements and who leverage resources to create new institutions or to transform existing ones”. In the field of social entrepreneurship, the microfinance initiatives of social enterprises in institutional void contexts like Bangladesh or Bolivia serve as prominent examples that have changed the rules of the game in the banking industry by providing financial loans to low-income clients who were previously excluded from such services (Dorado, 2013; Mair & Marti, 2009). However, changing dysfunctional

institutional arrangements requires extensive human capital (Battilana et al., 2009; Dorado, 2013; Tracey et al., 2011) that usually only a relatively small number of social entrepreneurs in institutional void contexts possess. Moreover, social entrepreneurs in authoritarian states also tend to abstain from institutional work as they are afraid to violate societal rules or to interfere with the government's mandate (Bhatt et al., 2019) while others fail because of intense resistance from powerful actors (local authorities, private organizations or the media) in the institutional environment (Granados et al., 2022).

Despite the existence of various coping mechanisms that social entrepreneurs could use to compensate for the absence of strong formal and informal institutions, all of these mechanisms come with significant disadvantages. Consequently, entrepreneurial operations in contexts of severe institutional voids remain a highly challenging endeavor. Therefore, these entrepreneurs either need to be exceptionally qualified to persist and grow in such environments (Seelos & Mair, 2005a) or they need to move their operations to institutional support contexts that might be more resourceful and easier to navigate (Ault, 2016).

5.3.2 Social entrepreneurship in contexts of institutional support

In contrast to an institutional void context, scholars have widely acknowledged the beneficial impact that an institutional support environment with high institutional quality has on fostering productive entrepreneurship activities (Baumol, 1996; Chowdhury et al., 2019; Sobel, 2008; Webb et al., 2020) and social entrepreneurship in particular (Estrin et al., 2013, 2016; Korosec & Berman, 2006; Stephan et al., 2015). "While robust formal institutions provide entrepreneurs with equitable treatment, greater efficiencies, and effectiveness within and across localities, robust informal institutions provide supporting benefits, allowing a greater variety of entrepreneurial actors to approach resources necessary for their pursuits" (Webb et al., 2020: 514).

Strong market-supporting institutional arrangements are predominantly found in developed economies rather than less developed economies, in which institutional voids are more dominant (Khanna & Palepu, 1997; North, 1990; Peng, 2003; Ramamurti, 2000). In this sense, a formal market-supporting institutional context is characterized, for example, by a strong regulatory and legal system, ample government support, political and socio-economic stability, universal access to high-quality education and healthcare, strong property rights protection, advanced

transportation and communication infrastructure, and high resource availability. In contrast, an informal market-supporting institutional context is characterized by high human capital levels in terms of advanced knowledge and capacity in different subject areas, high levels of trust in society, as well as strong values, norms, and beliefs that support efficient market transactions.

For entrepreneurial actors, an institutional environment with a strong focus on functioning laws and regulations makes it easier to start an entrepreneurial venture (Estrin et al., 2016; Stenholm et al., 2013). Institutional support contexts also provide entrepreneurs with better access to financial resources (Chowdhury et al., 2019; Collewaert et al., 2021; Sharir & Lerner, 2006) and better protection from bankruptcy (Fu et al., 2020). Furthermore, strong municipal government support, such as that seen in many cities in the USA, helps social entrepreneurs to raise awareness of social problems, acquire resources, and join forces with other organizations (Korosec & Berman, 2006). Entrepreneurs also benefit from high levels of interpersonal trust in a given society, since it reduces uncertainty and increases the ability to build reliable and less costly business partnerships (Bammens & Collewaert, 2014). As outlined by de Soto (2006), interpersonal trust tends to be comparatively high in developed world regions (e.g., 60% of Swedes trust each other), while it tends to be comparatively low in less developed regions (e.g., only 4% of Brazilians trust other Brazilians). High levels of trust in a given society were also found to be positively related to the emergence of social entrepreneurship within that society (Pathak & Muralidharan, 2016).

Another notable aspect of institutional support contexts refers to dedicated legal frameworks for social enterprises such as the L3C in the USA, or the CIC in the UK, which provide greater legitimacy to stakeholders and external capital providers (Ebrahim et al., 2014). In combination with better resource access, this legitimacy reduces the need for social entrepreneurs to engage in institutional coping mechanisms such as bricolage (Desa, 2012), which frees up time and energy to focus on the social mission.

Despite the numerous advantages of institutional support environments for entrepreneurial activities, they can also become a burden for some entrepreneurs. For example, the cost of meeting the requirements of the strong regulatory environment in developed economies can hamper the creation and growth potential

of new firms (Klapper et al., 2006), while the absence of severe institutional voids can make entrepreneurs less resilient to external shocks (Chowdhury et al., 2019). Therefore, entrepreneurs who are embedded in multiple institutional contexts might have a comparative advantage over non-transnational entrepreneurs, which allows them to equilibrate institutional voids and supportive institutional levers for the benefit of their entrepreneurial venture.

5.4 Transnational entrepreneurs as institutional bridging agents

Regardless of whether social entrepreneurs reside in developed or devolving countries, they are inevitably confronted with some kind of institutional voids that impede the maximization of their social venture potential to a lesser or greater extent. This is because “no society is characterized by perfectly robust formal and informal institutions” (Webb et al., 2020: 513). However, substantial imbalances exist between different national context that imply considerable challenges for social entrepreneurs who work across national boundaries.

If non-transnational social entrepreneurs from an institutional support context decide to operate in an institutional void context and try to offset voids in the host country with supportive institutions from their home country, their liability of foreignness and outsidership is likely to impose a significant burden onto them. This is because “only the locally embedded really have the in-depth understanding of local contexts to be able to unpick the complexities and to anticipate the ramifications of attempted interventions” (Khan et al., 2007: 1431). Evidence from many foreign social entrepreneurs who struggle to maximize their social impact because they are unable to understand and adapt to the institutional context of the host country underscores this statement (Claus et al., 2021; Easterly, 2006; Shantz et al., 2018). Moreover, foreign interventions in contexts of institutional voids can also face strong resistance by local actors if these interventions are inconsistent with the local institutions (Webb et al., 2020). Since inadequate contextual bridging can lead to the failure of social entrepreneurship initiatives (Van Wijk et al., 2020), this raises questions about the potential advantage of transnational social entrepreneurs who are simultaneously embedded in two or more institutional contexts across national borders (Bolzani et al., 2020).

Previous scholarship has widely acknowledged transnational entrepreneurs as bridging agents who are able to span multiple institutional settings (Drori et al., 2009; Patel & Conklin, 2009; Portes et al., 2002; Riddle et al., 2010; Saxenian, 2002; Terjesen & Elam, 2009). Their ability to leverage the social embeddedness in the institutional contexts of both home and host countries is also understood as 'bifocality' (Patel & Conklin, 2009; Vertovec, 2004), a decisive factor that distinguishes transnational entrepreneurs from other types of border-crossing entrepreneurs like ethnic entrepreneurs, diaspora entrepreneurs, or international entrepreneurs. Ethnic entrepreneurs represent a group of entrepreneurs with a common origin and cultural background who operate predominantly in and for an ethnic enclave in the host country (Drori et al., 2009; Landolt et al., 1999; Patel & Conklin, 2009). In contrast, diaspora entrepreneurs are middleman minorities who stay connected with their ethnic group in both home and host country, but avoid assimilation in the host country (Drori et al., 2009; Nkongolo-Bakenda & Chrysostome, 2013), while "international entrepreneurs merely conduct the business-related activities of a given venture across national borders" (Patel & Conklin, 2009: 1047) without being socially embedded in their multiple contexts of operation.

The multiple social embeddedness of transnational entrepreneurs is the outcome of a long-term process of 'institutional acculturation' that consists of "the exposure to and adoption of institutional roles and relationships associated with a new cultural setting" while living in the host country (Riddle & Brinkerhoff, 2011: 671). Thus, the high familiarity with the institutional context of both home and host country significantly reduces the liability of foreignness of transnational entrepreneurs in comparison to non-transnational entrepreneurs (de Silva, 2015; Stoyanov et al., 2016). Furthermore, it enables them to better overcome 'institutional distances' (Prashantham et al., 2018), which refer to "the difference between the institutional profiles of the two countries" (Kostova, 1999: 316). In other words, transnational entrepreneurs' ability to leverage the best of both worlds provides them with a competitive advantage over non-transnational entrepreneurs (Harima et al., 2021; Neville et al., 2014).

Due to their high ability to navigate different institutional contexts, several authors have described transnational entrepreneurs as entrepreneurial elites (de Silva, 2015; Light, 2011; Lin & Tao, 2012; Portes et al., 2002) and distinctive agents

of change (Chen & Tan, 2009; Honig & Drori, 2010) who are able to transform institutional arrangements across national borders (Riddle & Brinkerhoff, 2011). For example, the context-sensitive international knowledge and resource injections by transnational entrepreneurs can provide a fast and efficient contribution to the development of entrepreneurial ecosystems in contexts of institutional voids (Harima et al., 2021) as well as institutional support (Baron & Harima, 2019), while they can also enhance the economic progress of underdevelopment regions (Saxenian, 2002). Furthermore, transnational entrepreneurs can serve as role models who inspire others in their country of origin to become transnational entrepreneurs themselves (de Silva, 2015; Harima et al., 2021; Schäfer & Henn, 2018). However, not all transnational entrepreneurs can realize and leverage this transformative capacity. Many of them are necessity-driven, low-skilled migrants who need to span different institutional environments as a means to ensure the survival of themselves and their families in contexts of poverty and violence (de Silva, 2015; Landolt et al., 1999; Lin & Tao, 2012). This limits their potential as active social change agents and calls for a more nuanced analysis of transnational entrepreneurship activities that considers a broader spectrum of migration directions as well as the differences in the human capital endowments of transnational actors with social entrepreneurship ambitions.

5.5 An institutional nexus perspective of social entrepreneurship

Previous scholarship has highlighted the considerable heterogeneity that exists among transnational entrepreneurs (Sequeira et al., 2009; Terjesen & Elam, 2009). However, the existent literature related to this growing field of study remains highly concentrated on two major migration directions. The first direction is concerned with bottom-up migrants who emigrated from developing or emerging market economies (as institutional void contexts with a comparatively low quality of market-supporting institutions) to developed economies (as institutional support contexts with a comparatively high quality of market-supporting institutions) while remaining embedded in both home and host context. Exemplifying research of transnational entrepreneurs with this type of migration direction is outlined in Table 5. In contrast, the second direction is also focused on transnational migrants from an institutional void context who migrated to an institutional support context, but who eventually returned to their country of origin, as outlined in Table 6. Thus, the bottom-up migration direction clearly dominates the literature.

Table 5: Literature of transnational entrepreneurs with a bottom-up migration direction

Authors	**Home Context**	**Host Context**
Bagwell (2008, 2015)	Vietnam	UK
Balachandran & Hernandez (2021)	India	USA
Ballard (2003)	Pakistan	UK
Collins and Low (2010)	Asia*	Australia
Drori et al. (2009)	China and India	Ireland and Canada
Kyle (1999)	Ecuador	North America* and Europe*
Landolt et al. (1999)	El Salvador	USA
Leung (2001)	Taiwan	Germany
Lin & Tao (2012)	China	Canada
Mafico et al. (2021)	Nigeria, Morocco, Sierra Leone, Uganda, Zimbabwe, Ghana, Kenya, Congo, Cameroon	USA, UK, Netherlands, Belgium
Patel & Conklin (2009)	Colombia, Dominican Republic, and El Salvador	USA
Patel & Terjesen (2011)	Colombia, Dominican Republic, and El Salvador	USA
Portes et al. (2002)	Latin America*	USA
Pruthi et al. (2018)	India	USA
Riddle et al. (2010)	Afghanistan, Ethiopia, Ghana, Morocco, Surinam, and Turkey	Netherlands
Santamaria-Alvarez & Śliwa (2016)	Colombia	USA
Saxenian (2002)	China and India	USA
Sequeira et al. (2009)	Latin America*	USA
Stoyanov et al. (2016, 2018)	Bulgaria	UK
Tubadji et al. (2020)	Albania	Italy
Varma (2011)	India	USA
Vershinina et al. (2019)	Eastern Europe*	UK
Villares-Varela & Essers (2019)	Latin American* and Turkey	Spain and Netherlands

* detailed countries for this region were either mixed or unspecified

Table 6: Literature of transnational returnee entrepreneurs with a bottom-up migration direction

Authors	**Home Context and Return Destination**	**Host Context**
Ammassari (2004)	Ghana, Ivory Coast	USA, UK, France, Germany
Bolzani et al. (2020)	Ghana	Italy
de Silva (2015)	Sri Lanka	USA, Australia, Canada, UK, and New Zealand
Guarnizo (1997)	Dominican Republic	USA
Kenney et al. (2013)	Taiwan, China, and India	USA
Pruthi (2014)	India	USA, UK, Canada, and Singapore
Schäfer & Henn (2018)	Israel	USA
Wadhwa et al. (2011)	China and India	USA

In comparison to these two dominant streams of research, other migration directions have received almost complete inattention and consequently remain largely underexplored and undertheorized. For transnational entrepreneurs who operate across institutional void contexts (i.e. cross-bottom) a very small group of researchers have dedicated themselves to this group of actors (e.g. Bosiakoh, 2017, 2019; Khosa & Kalitanyi, 2015; Rogerson & Mushawemhuka, 2015) while research on transnational entrepreneurs who operate across institutional support contexts (i.e. cross-top), as well as research on top-down transnational entrepreneurs who migrated from institutional support contexts to institutional void contexts is virtually absent.

Apart from different migration directions, previous research has also highlighted the critical role of human capital endowments on entrepreneurial success (Davidsson & Honig, 2003; Unger et al., 2011) and how high or low human capital levels differently shape entrepreneurial processes in contexts of institutional support and institutional voids (Dencker et al., 2021). While different migration directions can be regarded as structural boundary conditions that limit the opportunities available to transnational entrepreneurs, different human capital levels correspond to their personal agency to make free choices about whether or not to engage in a certain type of entrepreneurship. Highly skilled bottom-up migrants, like Indian IT specialists in Silicon Valley, for example, tend to be pulled into transnational entrepreneurship by

opportunity (Saxenian, 2002), while low-skilled bottom-up migrants, like many crisis-shaken Salvadorans who fled to the United States, tend to be pushed into it by necessity (Landolt et al., 1999). Likewise, social entrepreneurship activities are mostly ascribed to privileged individuals with high levels of human capital (Barki et al., 2020; Estrin et al., 2013, 2016), rather than low-skilled individuals whose entrepreneurial activities must often primarily ensure the fulfillment of their own basic needs before they can cater to the needs of others.

By introducing an institutional nexus perspective of social entrepreneurship, I contend that even low-skilled migrants in contexts of institutional voids can turn into successful social entrepreneurs if they maintain a transnational embeddedness in other institutional contexts as a compensation mechanism for their human capital deficiencies. More broadly, I argue that the capacity for transnational social entrepreneurship activities varies considerably among transnational social entrepreneurs with different migration directions and human capital levels. Following this reasoning, I present a contextualized framework with four sets of propositions to advance the knowledge base at the intersection of transnational and social entrepreneurship (see Figure 3).

Figure 3: A contextualized framework of transnational social entrepreneurship from an institutional nexus perspective

		Institutional Migration Directions of TSEs			
		Cross-top	Top-down	Bottom-up	Cross-bottom
Human Capital	High	Transnational Elites *Proposition 1a*	Transnational Catalyzers *Proposition 2a*	Transnational High-Potentials *Proposition 3a*	Transnational Bricoleurs *Proposition 4a*
	Low	Transnational Scions *Proposition 1b*	Transnational Do-Gooders *Proposition 2b*	Transnational Risers *Proposition 3b*	Transnational Survivalists *Proposition 4b*

5.5.1 Transnational Elites: High-skilled cross-top migrants

The first proposition of the framework examines cross-top TSEs with high human capital endowments whose home and host country embeddedness spans two or more institutional support contexts, such as Germany and Japan, or Canada and the USA. I describe these TSEs as Transnational Elites because they are exposed to very few institutional voids while their high amount of human capital allows them to bridge these voids by capitalizing on the myriad of supportive institutional levers available to them. Since social entrepreneurship commonly involves the innovative use and combination of resources to pursue opportunities for social change (Mair & Marti, 2006; Mair & Noboa, 2006), Transnational Elites are in an exceptional position to exploit such opportunities. As privileged transnational actors, they are able to take advantage of the most prestigious educational institutions across developed economies to design outstanding social inventions that are applicable to more than one national context. With an abundance of high-quality resources available through public institutions in their home and host countries as well as through their transnational networks, they are able to turn these inventions into scalable social innovations that can benefit a large number of beneficiaries. Because of their transnational embeddedness Transnational Elites can often take further advantage of higher tax efficiencies, better banking and investment opportunities, lower bureaucracy, as well as greater lifestyle opportunities by locating a particular business operation or registration in the respectively more favorable country.

Examples of Transnational Elites are social entrepreneurs like Bill Drayton, the founder and CEO of Ashoka, who studied at elite universities in the United States and the United Kingdom before he founded Ashoka in 1980. Ashoka is a global social network organization with more than 3,500 international fellows and seeks to cultivate the world's most impactful social entrepreneurs in order to generate system-changing social innovations. However, Transnational Elites can also exist as transnational teams such as that of the Scottish Mel Young and the Austrian Harald Schmied, who founded the Homeless World Cup Foundation together in 2001. The Homeless World Cup is an official international football tournament for homeless people which claims to have improved the lives of more than 1.2 million homeless people, changes societal perceptions of homelessness, and generated over $360 million US dollars in annual

savings to the public and/or benefits to individuals (Homeless Worldcup Foundation, 2022).

Due to the comparatively low amount of institutional voids that Transnational Elites have to deal with, I argue that they will have relatively little need to engage in coping mechanisms such as bricolage or informal economy operations to ensure the survival of their social enterprise. Instead, I contend that Transnational Elites are exceptionally qualified to function as institutional entrepreneurs who are able to leverage their superior transnational resource and knowledge endowments to transform dysfunctional institutional arrangements that inhibit large-scale social change. However, since cross-top migrants lack a social embeddedness in developing economies, their context-sensitive effectiveness will be limited if they decide to directly operate within these contexts without sufficient institutional acculturation, context-specific human capital development, or the use of local intermediaries.

> ***Proposition 1a***: *Transnational Elites are in the most privileged position to drive social change within the institutional support contexts of their embeddedness while their context-sensitive effectiveness in institutional void contexts will be limited.*

5.5.2 Transnational Scions: Low-skilled cross-top migrants

Although institutional support contexts are characterized by strong and advantageous institutional structures, imperfections within these structures also allow for the existence of individuals with low human capital endowments. I refer to these individuals as scions, which the Merriam-Webster dictionary describes as individuals who were born into a powerful family. For example, while some individuals of institutional support contexts are not reached by the education system, excluded from it, or alienate themselves from it, others might be impeded to develop the full potential of their human capital due to blows of fate, mental health issues, or societal marginalization. However, due to social safety nets and the high amount of supportive institutional levers available to them, I argue that these individuals can still become successful social entrepreneurs, especially when they receive support from powerful institutional intermediaries that are located within support contexts.

I exemplify this argument with the case of David Duke (see Smith, 2018), a Scottish person who drifted into homelessness at the young age of 21, following the

death of his father. After three years of rough sleeping, he got involved in the Homeless World Cup in 2004. This life-changing experience encouraged him to go to college, enhance his human capital endowments, and become a community support worker. With a £3,000 start-up grant from a Scottish business incubator, he founded Street Soccer Scotland in 2009 and orchestrates it across Scotland and England. The social enterprise seeks to empower socially excluded people through the means of football-inspired training and personal development. It runs on funding and donations from a broad range of public and private institutions and relies on hundreds of volunteers while generating further income by hosting a variety of charity events. In line with the success of Street Soccer, David Duke also developed personally and became the Global Ambassador of the Homeless World Cup organization, an Advisory Board Member at UNICEF, a Member of the Most Excellent Order of the British Empire (MBE), and received an Honorary Degree of Doctor of Science from Glasgow Caledonian University.

Based on this example, I argue that the external support for Street Soccer and the recovery and development of its founder was facilitated to a large extent by the institutional support context in which the founder and his organization are embedded. Imagining the same case across institutional void contexts, I argue that it would be considerably more difficult to achieve similar outcomes since supportive institutional levers are less prevalent in those contexts.

For transnational individuals with low human capital levels who are embedded across institutional support contexts, I furthermore suggest that one promising way to unfold their potential as social change agents is by making use of institutional intermediaries. This might include, for example, becoming a franchisee of an international social venture franchisor who is looking for locally embedded actors. While the franchisor can provide the professional framework and guidance for the insufficiently skilled franchisee to scale social value (Giudici et al., 2020; Tracey & Jarvis, 2007), and thereby fill their human capital gap, the transnationally embedded franchisee would be able to execute the social venture in his/her/their home and/or host country. As scions of the strong institutional infrastructure that surrounds them, cross-top TSEs can consequently become social change agents despite their low skill levels and little professional experience. Therefore, I propose:

***Proposition 1b**: Transnational Scions can drive social change despite low human capital levels by developing their capacity through the broad availability of high-quality institutional levers and support structures available to them.*

5.5.3 Transnational Catalyzers: High-skilled top-down migrants

Social problems exist all over the world, but they are most salient in less developed economies where the very basic needs of millions of people remain still unmet. Although local social entrepreneurship activities that aim to mitigate social injustices exist even in the most underdeveloped world regions with severe institutional voids, these are predominantly small-scale ventures that are run by social entrepreneurs who are "far less often highly educated than in other global regions" (Bosma et al., 2016: 5). Consequently, their capacity to drive positive social change remains highly limited if they are without adequate access to human capital and institutional support. This provides a sharp contrast to many social entrepreneurs 'from above' who are highly educated, institutionally privileged, and committed to finding new solutions that can help disadvantaged local actors to solve their most pressing problems.

In line with rising levels of globalization, numerous non-transnationally embedded social entrepreneurs from institutional support contexts are taking the opportunity to cross international borders in order to alleviate the suffering of those at the bottom of the pyramid (Austin et al., 2006; Seelos & Mair, 2005a). However, their activity is often ineffective (Alvarez & Barney, 2014) or even detrimental and harmful (Hall et al., 2012). This is because many international social entrepreneurs fail to discern and adapt to the institutional complexity of the host country context (Chen et al., 2018; Claus et al., 2021), for which the unreflective imposition of Western models rarely provides a workable solution (Shantz et al., 2018). Top-down TSEs, in contrast, are socially embedded in both institutional support and institutional void context which provides them with a higher legitimacy for their organizations (Bolzani et al., 2020) and the ability to find entrepreneurial solutions that are in alignment with the sociocultural context of their beneficiaries.

To overcome institutional voids in the less developed host economy, high-skilled top-down TSEs can leverage supportive institutions from their home country to catalyze social change in the institutional void context in which they operate. For example, they can more easily register their social enterprise in developed economies in order to circumvent some of the often high bureaucratic barriers to starting and

running a business in developing countries. Furthermore, they might be better able to connect their beneficiaries to more affluent clients abroad or attract foreign volunteers to provide additional support. However, as demonstrated in the first paper of this thesis, which includes a number of top-down TSEs from the USA, the UK, Switzerland, and France who migrated to Ecuador and started a social enterprise that works with local indigenous communities, the persistence of sociocultural differences between top-down TSEs and their indigenous beneficiaries still requires the TSEs to continuously engage in a reflective process of bi-directional learning and adaptation despite their embeddedness in the host country since they are not from the same ethnic background. Although this might make some TSEs less effective than bottom-up returnee entrepreneurs who are from the same origin as their beneficiaries, I argue that their access to advanced knowledge and resources from abroad qualifies them as important development agents who can catalyze social change in contexts of institutional voids better than many non-transnational social entrepreneurs from abroad. This leads me to the following proposition:

> ***Proposition 2a:*** *Transnational Catalyzers are in an advantageous position to drive social change in institutional void contexts when they can effectively bridge the social distance to their beneficiaries and leverage their high human capital in line with supportive institutions from their developed home economies.*

5.5.4 Transnational Do-Gooders: Low-skilled top-down migrants

Within the group of top-down TSEs, one must also consider the existence of individuals with low levels of human capital who, out of naïveté and despite their lack of preparedness for the roles they take on, follow their desire to create a social venture in an institutional void context. I describe these TSEs as Transnational Do-Gooders who come with idealistic intentions to support disadvantaged others but lack the skills and experience needed to turn their ideas into effective solutions. Although their transnational embeddedness allows these actors to translate their social concept across different institutional environments, which gives them a potential advantage over low-skilled non-transnational social entrepreneurs, their low human capital level is likely to complicate their endeavor to maintain and scale their social impact over time. In comparison to cross-top migrants with low human capital, Transnational Do-Gooders are in a much more fragile position by having less supportive institutional levers available to them in the host country. For example, while fewer institutional

intermediaries like business incubators, accelerators, or franchisers exist in developing economies than in developed economies (Cao & Shi, 2020; Sydow et al., 2022), those intermediaries that do exist might be reluctant to support social entrepreneurship operations that appear to be beyond the capabilities of Transnational Do-Gooders. Additionally, organizations for human capacity-building often prefer to provide training to those at the bottom of the economic pyramid (Campos et al., 2017; Mair et al., 2012; McKague et al., 2015) rather than to low-skilled foreign social entrepreneurs from more wealthy countries.

Despite the limited capacity of Transnational Do-Gooders, they can still count on a strong institutional backup from their developed home countries. For example, as predominantly Western actors, they typically have better access to cheaper financing and advanced technology (Khanna & Palepu, 1997) that they can invest to turn their idea into practice. Although support from institutional intermediaries is presumably limited for Transnational Do-Gooders, some specialized organizations do exist, such as the UK-based crowdfunding platform UpEffect, which provides not only funding but also professional business coaching to increase the success rate of those social entrepreneurs who have a promising idea but lack the capacity to realize it (Farhoud et al., 2021). Additionally, Transnational Do-Gooders who have already reached retirement age can often rely on regular pension payments or savings that have overproportionate value in many developing countries where living costs tend to be lower.

Low-skilled entrepreneurs who operate in developed economies also tend to compensate for their low human capital by imitating the innovative business activities of others (Dencker et al., 2021), although these activities usually have a low economic potential in the same market. However, when taken to an institutional void context, a market imitation from an institutional support context can still represent an unprecedented product or service that might be attractive to a broad audience and thereby support the social mission of the venture. Furthermore, the institutional void context to which a Transnational Do-Gooder migrates might be very appealing to volunteers from abroad who seek to combine an adventurous travel experience with the opportunity to make a positive social impact and who can bring important human capital that the Transnational Do-Gooder is lacking. However, compared to Transnational Catalyzers who have the capacity to proactively leverage a high

amount of human capital in combination with supportive institutional levers to scale their social enterprise in institutional void contexts, I argue that Transnational Do-Gooders have a much lower ability to do so.

> ***Proposition 2b:*** *Transnational Do-Gooders tend to rely on institutional support from developed economies to persist in institutional void contexts and carry a high risk to fail to drive social change unless they are able to increase their human capital by themselves or through external support.*

5.5.5 Transnational High-Potentials: High-skilled bottom-up migrants

The third set of propositions refers to bottom-up TSEs who migrate from institutional void contexts to institutional support contexts. Many of these migrants are endowed with high amounts of human capital - as well-educated graduates or as professionals with several years of work experience in their home country. By migrating to institutional support contexts, they can further refine and improve their skillsets beyond the limits of institutional void contexts while taking advantage of more supportive institutional levers. However, despite their high human capital levels, bottom-up migrants are often underemployed (Fernando & Patriotta, 2020) since many organizations perceive them as a potential threat to their organizational norms and practices (Risberg & Romani, 2022). To escape from workplace discrimination, entrepreneurship, and social entrepreneurship in particular, can provide a more promising and fulfilling alternative for the benefit of others in both home and host countries. While high-skill TSEs can be assumed to be particularly promising social entrepreneurs for the alleviation of social issues of co-ethnics in the host country, they also embody a high potential as social change agents when they return to, or operate in, their country of origin after acquiring advanced skills and competencies abroad. Furthermore, they can enrich the social entrepreneurship ecosystem in institutional support contexts by introducing new concepts from their country of origin.

One famous example of a Transnational High-Potential is Muhammad Yunus, a Bangladeshi TSE who was awarded the Nobel Peace Prize for his pioneering work on microfinance. As outlined by Balakrishnan (2020), Yunus grew up in Bangladesh where he worked as a lecturer in economics until he received a Fulbright scholarship that enabled him to get a PhD and a professorship in economics from two different universities in the United States. During his time in the USA, he also founded a citizens committee together with other Bangladeshi emigrants and the support of

several US institutions to campaign for liberation on the occasion of the Bangladesh War of Independence. After several years in the United States, he returned to Bangladesh, where he developed the Grameen Bank concept after convincing several international development organizations to invest in his social innovation that favors microloans over charity to fight poverty by providing destitute micro-entrepreneurs with the seed capital to start their own business. As of October 2021, the Grameen Bank has outlined its presence in 93 percent of the total villages in Bangladesh, serving 9.44 million members, of whom 97 percent are women. Another renowned example of a Transnational High-Potential is Ibrahim Abouleish, an Egyptian TSE who studied and worked in Austria for over 20 years before he returned to Egypt to establish the comprehensive development initiative Sekem which promotes sustainable agriculture, female empowerment, integrative healthcare, and free education (see Seelos & Mair, 2005b).

In comparison to Transnational Catalyzers with a top-down migration direction from abroad, Transnational High-Potentials have a smaller sociocultural distance to their beneficiaries in the home country, especially if they are of the same ethnicity. For TSEs from abroad, in contrast, a certain liability of foreignness always remains (Stoyanov et al., 2016), even after many years of social embeddedness in the host country. As exemplified in the first paper of this thesis, indigenous TSEs from Ecuador require less interpersonal interaction to integrate and produce meaningful social outcomes with and for their co-ethnic beneficiaries in Ecuador than do Ecuadorian non-indigenous TSEs or Foreign TSEs who work with the same beneficiaries.

Transnational High-Potentials who return home after several years of education and professional development in developed countries (e.g., due to patriotic, family, economic, or cultural reasons) therefore also play a critical role in pioneering the establishment of an entrepreneurial ecosystem in their home country by applying transnational network resources as well as advanced technical and commercial knowledge from abroad (Saxenian, 2007; Schäfer & Henn, 2018). Although some of them were found to have difficulties in readjusting to their home country context (Armanios et al., 2017; Lin et al., 2016), they are in an advantageous position to transfer and integrate transnational knowledge and resources from institutional support contexts into institutional void contexts (Lin et al., 2019; Liu et al., 2010). Their skill-adequacy and context-relevance also enhances their opportunities to receive

support from public institutions and intermediary organizations who seek to invest their resources into the most capable development agents of local origin (Armanios et al., 2017). Moreover, many transnational returnees tend to expand their entrepreneurial activities from the home country to markets with similar institutional voids that others might shy away from (de Silva, 2015).

In this regard, I argue that the low sociocultural distance to their co-ethnic beneficiaries in the home and host country, in combination with access to advanced knowledge and resources, represents an excellent condition through which highly skilled bottom-up TSEs can drive social change. Therefore, I propose:

> ***Proposition 3a****: Transnational High-Potentials have a high capacity to drive social change, particularly for co-ethnics in the home and host country by combining high human capital levels and supportive institutional levers with a low sociocultural distance.*

5.5.6 Transnational Risers: Low-skilled bottom-up migrants

As opposed to Transnational High-Potentials, I categorize bottom-up TSEs with low human capital endowments as Transnational Risers. These social actors have migrated to institutional support contexts without the skills and resources necessary to establish and scale a social venture but evidence the potential to acquire them through the supportive institutional levers in the developed host country environment. However, their challenges to become impactful TSEs are significantly greater than for bottom-up TSEs with high human capital endowments.

In general, bottom-up migrants, regardless of their human capital levels, often have to deal with a stigmatized identity that comes with discrimination, racial exclusion, and social marginalization, which hampers their access to adequate employment options in the host country, pushing many of them into entrepreneurship (Adeeko & Treanor, 2021; Ballard, 2003). This issue, however, is most severe for bottom-up migrants with low human capital endowments since their potential to make a meaningful contribution in developed economies is often denied. Bottom-up migrants with high amounts of human capital are often invited as an important brain gain by many developed countries that need to counterbalance demographic deficits due to low birth rates and the associated lack of skilled workers (Al Ariss & Syed, 2011). Even though this instrumental invitation does not protect them from discrimination, as outlined above, it usually gives them a better standing than

immigrants with low human capital. This is because locals from institutional support contexts frequently frame the latter as particularly threatening interlopers who put the welfare of developed economies in danger (Ballard, 2003; Klein & Amis, 2021).

The rejection by host country residents not only significantly reduces the opportunities for low-skilled immigrants to find employment opportunities, but also to become successful entrepreneurs on their own. To compensate for this disadvantage, for many of them "the only option may be to work within the ethnic enclave" (Sequeira & Rasheed, 2006: 368), although this option tends to be less beneficial and financially rewarding than working with locals outside the ethnic enclave (Kloosterman, 2010; Lancee, 2012; Moroşanu, 2016; Tubadji et al., 2020). This threatens to condemn bottom-up TSEs with low levels of human capital to be locked in a cycle of subsistence entrepreneurship that merely ensures their survival and safety. However, the institutional support structures of many developed economies can often prevent such a fate because "in developed environments, resources are more abundant, and welfare states typically provide sufficient support to allow individuals to fulfill their physiological needs", allowing entrepreneurs to concentrate on better self-realization (Dencker et al., 2021: 64). In addition, many intermediary organizations exist that are dedicated to the special needs of different migrant groups, such as business incubators specialized in refugee support (see Meister & Mauer, 2019). Furthermore, some bottom-up migrants might also be able to enhance their status and opportunities in the host country by engaging in transnational marriages (Beck-Gernsheim, 2007). These options can also pave the way to engage in social entrepreneurship activities which often target co-ethnics and compatriots in the home and host country. This prompts me to propose:

> ***Proposition 3b:*** *Transnational Risers can become social change agents by developing their human capital in line with the supportive institutional levers in the host country although their effectiveness is often inhibited by a stigmatized identity and host country rejection.*

5.5.7 Transnational Bricoleurs: High-skilled cross-bottom migrants

Transnational migration is also very salient across developing economies, comprising, e.g., transnational migrants across Latin America, Africa, or Asia. These individuals are embedded in environments in which market-supporting institutional levers are typically considerably scarce or underdeveloped. Those cross-bottom

transnationals who display high amounts of human capital endowments often belong to the better-off people in disadvantaged environments who are highly educated and financially wealthy. However, they also exist as necessity entrepreneurs who are equally well educated but whose economic basis and employment opportunities have been eroded by devastating environmental conditions such as civil war, famine, or natural disasters, pushing them to flee from their country (Dencker et al., 2021). Due to a lack of legal permissions or the financial means to enter a country in developed economies, the destination context is often a neighboring country where institutional levers remain underdeveloped. To effectively 'make do' with the disadvantageous institutional arrangements of the contexts they are bridging, high human capital levels become all the more important.

I categorize this group of transnationals as Transnational Bricoleurs who need to utilize their high human capital to discover and combine functioning institutional levers across contexts that are dominated by institutional voids. For example, a common strategy is to leverage political, professional, and family networks to access the often substantial public and private resources that exist in less developed economies (Armanios et al., 2017; Ge et al., 2019). To do so with maximum effect, this can be combined with other coping mechanisms. It includes, for example, the utilization of material and immaterial resources that are readily available in the local contexts, or the use of storytelling related to the ability of these entrepreneurs to overcome severe challenges and hardships for themselves or others in institutional void contexts in order to obtain external support through the commiseration of customers or donors with sympathetic values (Khoury & Prasad, 2016; Korsgaard et al., 2021). Such institutional bricolage strategies, I argue, can enable skilled cross-bottom migrants to pursue transnational social entrepreneurship activities even if their engagement in transnational entrepreneurship is initially driven by necessity, rather than opportunity.

An example of necessity-driven Transnational Bricoleurs is provided by Rogerson and Mushawemhuka (2015), who described how skilled Zimbabwean individuals have become successful transnational entrepreneurs in different industrial sectors after political and economic turmoil in Zimbabwe has pushed them to emigrate to South Africa. Although the neighboring country provided higher levels of economic and political stability, institutional voids like property theft and crime were still

commonplace. However, with additional financial assistance from friends and family as well the support of co-ethnic institutional intermediaries like the Zimbabwean Business Network in South Africa, they leveraged their high human capital to establish transnational enterprises beyond the subsistence level. Their enterprises cater to other Zimbabweans in the home and host economy while simultaneous interactions with local South African entrepreneurs further promote their bilateral business development.

The ability of high-skilled necessity entrepreneurs to identify a large range of entrepreneurial opportunities beyond local markets and the fulfillment of basic physiological needs is also highlighted by Dencker et al. (2021) and points to the potential of these entrepreneurial actors to establish transnational social ventures across institutional void contexts. However, the transnational social entrepreneurship potential of Transnational Bricoleurs is supposedly highest when they are already opportunity-driven, rather than necessity-driven. This is demonstrated by the example of Guillermo Jarrin, a transnational social entrepreneur and CEO of the Ecuadorian Tippy Tea venture (see UNCTAD, 2019). Jarrin studied commercial engineering in his home country Ecuador and became interested in tea products after visiting his sister in Chile. However, the absence of specialized knowledge on professional tea blending in Ecuador represented an informal institutional void that he sought to overcome by moving to Argentina, where he studied at one of Latin America's leading tea academies and became a tea sommelier. Two years later, he moved back to Ecuador and turned his passion for tea into an international social enterprise that that was unprecedented in the local market and which supports around 250 indigenous smallholder farmers in different regions of the country. As a Transnational Bricoleur, he thus leveraged his high human capital and combined a set of supportive institutional levers across institutional void environments to realize a social business opportunity that would have been imperceptible to non-transnational actors with similar human capital endowments. Against the backdrop of these examples, I argue:

> ***Proposition 4a****: Transnational Bricoleurs can drive social change by using their high human capital levels to discover and combine available supportive institutional levers across institutional void environments.*

5.5.8 Transnational Survivalists: Low-skilled cross-bottom migrants

In contrast to Transnational Bricoleurs, I describe TSEs who possess low human capital endowments and whose home and host countries are both characterized as institutional void environments as Transnational Survivalists. Although these individuals might display a strong prosocial motivation to support others, their means to do so are often severely constrained. This is because the supportive institutional levers and resources required to exploit wealth-creating opportunities are usually unavailable to unskilled social actors who reside in deprived environments (Alvarez & Barney, 2014). Consequently, entrepreneurs who operate under such circumstances are often subsistence-driven and tend to replicate existing and rarely scalable microbusinesses that they are able to observe in close proximity to their place of residence, such as hair salons, food services, or laundry shops (Dencker et al., 2021). To ensure the survival of themselves and their family, especially in times of political and economic crisis, many low-skilled actors at the bottom of the pyramid also migrate to other contexts of severe institutional voids and thereby become transnational necessity entrepreneurs. South Africa, for example, has become the destination of numerous low-skilled emigrants from other African countries who used their personal equity and borrowed financial resources from friends and family at home to create a modest microbusiness in the often discriminatory host economy, from which they frequently transfer large parts of their already meager incomes back home to support their relatives and to create new enterprises (Khosa & Kalitanyi, 2015). Under such circumstances, I argue that these transnational entrepreneurs will rarely find the surplus capacity and resources to increase their human capital and operate a business that goes beyond the fulfillment of their basic physiological needs.

To become TSEs despite low human capital levels and severe institutional constraints in the home and host context, I argue that Transnational Survivalists would need to observe an easily comprehensible and evidently profitable social business model in close proximity to their place of residence that they can replicate with the readily available resources across the deprived environments in which they are embedded. Alternatively, their personal network would need to include contacts to skilled and resourceful actors who are willing to support them. The case of Mbarouk Mussa Omar, a poor islander from Pemba in the Zanzibar archipelago of Tanzania, serves as an example in this regard (see Gibbens, 2018). Mbarouk turned into a TSE

after he visited some friends on Kokota, a neighboring islet of Pemba where deforestation, depleted fisheries, and dried-up rivers have pushed the tiny, one square kilometer island toward the brink of collapse - a fate that threatened his home island as well. However, after he met a Canadian tree planter who resided in Pemba to write a novel, Mbarouk was able to create a non-profit organization and started restoration projects on both islands. Through the help of his Canadian partner, who also took care of international fundraising while Mbarouk concentrated on local community management, the organization was able to secure funding from the Finnish embassy, the European Union, and the Global Climate Change Alliance. This allowed the organization to build Kokota's first school, establish freshwater reservoirs, and regrow local forests. It also facilitated agricultural exports from Pemba to international clients like the UK-based cosmetics company Lush, while it enabled the community to successfully and innovatively adapt to the increasing challenges imposed by climate change. This leads me to propose:

> ***Proposition 4b:*** *Transnational Survivalists can drive social change if they can observe a proximate social venture that is easily replicable across institutional void contexts or if their social capital includes contacts to skilled and resourceful actors who are willing to support their social entrepreneurship intentions.*

5.6 Discussion

In this paper, I advance the nascent field of transnational social entrepreneurship at the intersection of the established research domains of transnational entrepreneurship and social entrepreneurship (Bolzani et al., 2020). While I acknowledge the extensive representation of geographical regions and nationalities in both transnational and social entrepreneurship research, I criticize the overly narrow concentration of transnational entrepreneurship research in terms of migration directions. I argue that the prevailing focus on transnationals from less developed economies who either migrated to developed countries or returned from developed economies to their home country in the developing world neglects the evident richness of this research stream and leaves important facets of transnational entrepreneurship unexplored and undertheorized. This particularly concerns the implications of transnational organizing for social entrepreneurship activities.

To amplify the contextualization of transnational entrepreneurship by theorizing on four different migration directions of TSEs, I argue that each migration

direction implies different challenges and opportunities for transnational migrants to pursue social entrepreneurship activities. Additionally, I contend that varying levels of human capital endowments have further critical implications for the potential of TSEs to drive social change. I furthermore believe that this paper offers several important insights for theory development in transnational entrepreneurship, social entrepreneurship, and beyond.

Contributing to the field of social entrepreneurship, this paper addresses the lack of attention to the institutional context(s) in which social entrepreneurship activities take place (Bhatt et al., 2019) and how social entrepreneurs engage with the institutional environment that surrounds them (Ault, 2016; Bylund & McCaffrey, 2017; Dacin et al., 2010; Sutter et al., 2019). In particular, the research complements and connects the institutional void and institutional nexus perspectives of social entrepreneurship (Stephan et al., 2015) by introducing an institutional nexus perspective that focuses on context-spanning social entrepreneurship activities. This perspective augments the dichotomous and constrained division of social entrepreneurship as taking place in either institutional support or institutional void contexts. With increasing globalization levels, a growing number of entrepreneurs has the ability to move across international borders in order to take advantage of supportive institutional levers available in the global arena and link them to discover and exploit new opportunities for social change. This does not only concern transnational entrepreneurs with a dual or multiple contextual embeddedness, but also speaks to international or cosmopolitan entrepreneurs who are not bound to a single geographic location.

Contributing to the field of transnational entrepreneurship, the paper addresses the broad diversity that exists among transnational entrepreneurs (Terjesen & Elam, 2009) by putting a particular focus on the spectrum of migration directions including cross-top, top-down, bottom-up, and cross-bottom migration. I argue that each migration direction represents a macro context that roughly demarcates the scope of opportunity exploitation for transnational entrepreneurs. Additionally, I respond to calls for greater attention to the role of human capital and its impact on transnational entrepreneurship activities in different geographical contexts (Terjesen et al., 2016). While previous research has emphasized that social entrepreneurship is predominantly undertaken by privileged actors with high human

capital levels (Barki et al., 2020; Estrin et al., 2016), this research suggests that a transnational embeddedness can function as a compensation mechanism to facilitate social entrepreneurship despite low human capital levels, since a larger number of supportive institutional levers is available to transnational actors. With a dual contextual embeddedness, transnational entrepreneurs are in an advantageous position to access governmental support from both contexts, enhance their social capital and resource availability from a multi-contextual network, and improve their visibility to institutional intermediaries who are active in the home and/or host country to provide business support and personal development training to run a social enterprise. Previous research has also highlighted the importance of 'institutional friction' as the tensions and resistances that occur when two different institutional systems collide in an attempt to replicate opportunities from one context in another context (Shenkar, 2001; Shenkar et al., 2008). To overcome institutional friction, entrepreneurs typically need to engage in processes of experimentation and adaptation to gradually gain acceptance for an entrepreneurial opportunity that they seek to transfer across institutional contexts (Alvarez & Barney, 2014). The bifocal social embeddedness of transnational entrepreneurs, however, suggests a significantly reduced level of institutional friction for a more effective and efficient realization of entrepreneurial opportunities across institutional boundaries. Furthermore, I argue that some migration directions provide significantly better structural conditions for transnational entrepreneurship than others, while different human capital levels correspond to an enhanced or constrained agency to effectively act upon them.

The institutional nexus perspective proposed in this paper provides a theory-based lens for which I hope that future research finds it useful to hone and advance scholarship on transnational social entrepreneurship and adjacent research streams in a systematic way. Since "entrepreneurship as a commonplace social phenomenon remains much richer than our research yet portrays it to be" (Welter et al., 2019: 324), I contribute to the important task of a broader and deeper contextualization in entrepreneurship research (Newth & Woods, 2014; Welter, 2011; Welter & Smallbone, 2011; Zahra & Wright, 2011) by conceptualizing transnational entrepreneurship around previously neglected migration directions. In addition, I believe that this work has further relevance to policymakers and other institutional

actors who are in a position to implement and strengthen institutional levers that can support transnational migrants to engage and succeed in turning their social motivation and capacity into an entrepreneurial venture that can contribute to wider social change.

5.7 Limitations and suggestions for future research

This research does not come without limitations. For example, the distinction between institutional support and institutional void contexts does not allow for a detailed portrayal of the diverse development levels that exist between different economies and the regions within them. In this regard, future research will benefit from inter- and intra-country comparisons of both formal and informal institutional support and institutional void contexts in order to obtain new insights on the transnational social entrepreneurship phenomenon. This also opens several opportunities to advance entrepreneurial ecosystem research (Wurth et al., 2021) by exploring how different transnational institutional ecosystems facilitate or constrain transnational social entrepreneurship.

Different TSEs within the institutional support and the institutional void category also display significant variations in terms of the type and amount of supportive institutional levers they prefer to utilize for their social venture, depending on their availability. For example, the European Social Entrepreneurship Monitor 2020-2021 outlined that almost half of the surveyed European social enterprises take advantage of external support organizations while the preference for this important institutional lever is significantly higher in the United Kingdom than in Denmark or Spain (Dupain et al., 2021). Furthermore, Dencker et al. (2021: 73) argued that “individuals with similar levels of human capital will engage in entirely different types of entrepreneurial processes when they are located in different environments”. Future research opportunities consequently lie in the exploration of preferred institutional levers among TSEs from different countries. As “even neighboring countries differ significantly in their cultural and economic institutions” (Zahra et al., 2005: 134), this also implies the need for further research on ethnic and cultural distances that exist among transnational entrepreneurs in different contexts (Kariv et al., 2009; Portes et al., 2002; Tubadji et al., 2020; Wang, 2020). For example, in a study of Chinese, Indian/Sikh, Italian, Jewish, and Vietnamese transnational immigrants in Canada, Kariv et al. (2009) found that Chinese and Italian transnationals prefer to become

members of co-ethnic associations in the host country, while Vietnamese maintain a strong connection to their ethnic community by frequently traveling to their home country, and that Chinese and Vietnamese are the most frequent remittance receivers from co-ethnics at home and abroad. But also other personal attributes such as age, gender, or religion require further exploration among transnational actors.

Another promising avenue concerns the identity (crisis) of transnational social entrepreneurs. As noted by Rouse (1991), some transnationally embedded actors describe themselves as being unable to define their national or ethnic identity anymore. While some might continue to identify with their home country, irrespective of their citizenship or the time they lived abroad, others might rather identify with the host country, and yet others might adopt a mixed identity. This can have critical implications for research on TSEs in terms of the beneficiaries they support within or outside their ethnic community in the home and host country. Additionally, it raises further questions about the role of the degree of embeddedness of TSEs for their social entrepreneurship outcomes. By extending previous scholarship on the impact of different periods in the home country, in the host country, and after return on the firm performance of returnee entrepreneurs (Lin et al., 2019), future research might explore whether those TSEs who lived abroad for decades are better able to leverage their transnational embeddedness for social entrepreneurship outcomes than those who merely worked or studied abroad for a couple of years, or whether they are worse off because their long-term embeddedness in the host country might have led to a decay of their home country networks.

Although I argue that TSEs are in an advantageous position to engage in social entrepreneurship activities because their transnational embeddedness allows them to take advantage of a cornucopia of resources, contacts, and supportive institutional levers from multiple contexts, I do not seek to depict them as heroic entrepreneurial actors. Many TSEs also fail to use their power to drive positive social change, and future research will be necessary to explore the rates and determinants of success and failure among TSE enterprises. This also points to variations in the types of capital that TSEs embody. While this work has focused on human capital as a general term for human skills and experiences, future research would benefit from a more nuanced approach that considers the role of social capital, cultural capital, economic capital, and political capital in relation to the embeddedness of the TSEs.

Additionally, this work provides a steppingstone for future research on necessity and opportunity-based transnational social entrepreneurship. With growing numbers of social enterprises around the globe (Bosma et al., 2016), scholars might find it useful to explore whether and how transnational social organizing can also be a promising approach for necessity-based migrant entrepreneurs or whether this continues to be an organizational construct for rather privileged individuals.

A further important research direction refers to the sad reality that many transnational migrants experience some form of discrimination, jealousy, criminal and xenophobic attitudes and behavior by other citizens (Khosa & Kalitanyi, 2015), which might vary considerably among different migration directions and human capital levels of the migrant. For future research, it might be of particular interest to explore whether TSEs, under consideration of the different migration directions, are more welcome than other transnational migrants because they help to eradicate social problems within the host economy, or whether they experience the same degree of discrimination as their transnational compatriots who engage in commercial entrepreneurship or host country employment.

Overall, this research invites scholars to extend my concept and empirically test my propositions. The emerging field of transnational social entrepreneurship offers various important research opportunities for a better understanding of the phenomenon that will further benefit the overlapping fields of social entrepreneurship and transnational entrepreneurship.

5.8 Conclusion

Transnational migration is an everyday global phenomenon that also involves a great number of social entrepreneurship activities. These transnationally embedded social entrepreneurs exist in every country but differ considerably in terms of their migration direction and their human capital endowments. Despite ample empirical evidence of the importance of other migration directions, longstanding research on transnational entrepreneurship has maintained an overly narrow focus on bottom-up migration, while transnational social entrepreneurship has only recently entered the research agenda. I hope that my introduction of an institutional nexus perspective will inspire other scholars to conduct future research that will advance the knowledge base about this important, yet underexplored and undertheorized topic.

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6 Discussion

The three papers above represent three different examples of hybrid organizing on three different organizational levels. While the first paper relates to the micro-level by focusing on the practices of individual social entrepreneurs, the second paper represents the meso-level by focusing on the organizational governance mechanisms of social enterprises, and the third paper connects to the macro-level by focusing on context-spanning social entrepreneurship across national borders and institutional boundaries. In this section, I apply the major elements of Bourdieu's theory of practice framework to the three papers in order to provide a relational perspective on hybrid organizing across the three different levels. The objective is to move away from an overly narrow and siloed understanding of hybrid organizing in the context of social entrepreneurship and towards a more comprehensive and differentiated one that connects agency, structure, and practice.

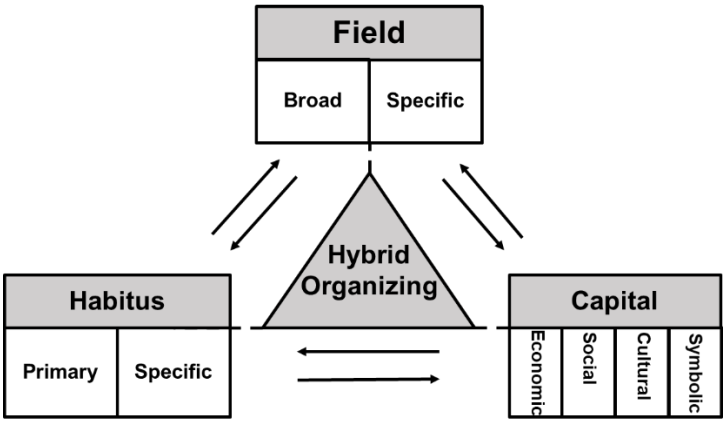
As organizational hybridity comes in many different shapes, I argue that the field of entrepreneurship, and social entrepreneurship in particular, will also benefit from a wider, cross-level integration of multiple varieties of hybridity that go beyond the limiting conception of blended social and economic activities that clearly dominates the social entrepreneurship literature. As noted by Battilana et al. (2017), the phenomenon of hybrid organizing is much more complex than the existing literature depicts, and future research will need to capture these complexities from different perspectives. The examples of the hybrid phenomena provided in this thesis are only a few indicators for the depth of hybridity that exists in the social entrepreneurship context and for the empirical and theoretical opportunities it provides.

6.1 A relational perspective on hybrid organizing

As illustrated in Figure 4, the relational perspective of this thesis regards hybrid organizing as a practice of social actors that is shaped by the interplay of the three major Bourdieusian elements of field, capital, and habitus. In the following sections, I will outline the influence of each element on hybrid organizing by using the insights from the three papers. Since "[a] relational perspective first and foremost is based on the assumption that the agency–structure dualism could be overcome through an understanding of social reality as comprising varying and distinctive layers that are

mutually interdependent and interlocking" (Tatli et al., 2014: 622), I will start with the Bourdieusian field element that corresponds to the interplay of multiple structural layers.

Figure 4: A relational perspective on hybrid organizing



6.1.1 Hybrid organizing in relation to fields

The Bourdieusian notion of the field represents a social space that provides the structural boundary conditions for the actions of social actors and consists of multiple structural layers that Bourdieu (1990a, 1996) generally divided into broad fields and specific fields, which are both subordinate to the overarching and contested field of power. In relation to entrepreneurship research, a broad field can be conceived in terms of entrepreneurial disciplines or stratifications while a specific field can be understood in terms of particular entrepreneurial phenomena, actors, or environments. Depending on the gaze of the researcher, the practice of hybrid organizing, which also represents a field in itself, can consequently be located within the broader field of social entrepreneurship and in specific subfields such as prosocial power, hybrid enterprise governance, and spatial embeddedness, as this thesis demonstrates.

The relevance and usefulness of the field as a thinking tool and unit of analysis, as I argue, corresponds especially to the growing emphasis on the contextualization of entrepreneurial phenomena employing multiple contextual dimensions (Baker & Welter, 2018; Welter et al., 2019). In particular, Zahra et al. (2014b: 480) highlighted "temporal, industry, spatial, social and organizational, ownership and governance" dimensions as particularly important for significantly

advancing entrepreneurship research by grounding entrepreneurial phenomena in their natural setting. Since then, entrepreneurship scholars have made considerable contributions regarding these contextual dimensions, and have also become “more attuned to treating differences in context as potentially both constitutive of and constituted by entrepreneurial behavior and outcomes” (Baker & Welter, 2020: 9). In Bourdieusian terms, we can see this as a growing understanding of the structured and the structuring characteristics of social actors to shape and to be shaped by the field and its field rules. However, I argue that further progress can be made by also employing various contextual dimensions in the analysis of hybrid organizing within the field of social entrepreneurship, including a hybrid view on the spatial, temporal, and organizational dimensions, as well as on hybrid ownership and governance, to create novel connections that allow for the generation of new theory and knowledge. Moreover, the field as a thinking tool is important to understand the possibilities of hybrid organizing not only within a particular context but also in relation to other contexts. One way to do this is to regard hybrid organizing as a contested *strategic action field* in which, according to Fligstein and McAdam (2011), the actors involved intentionally or unintentionally alter their social position in the field, create a social order, establish field rules, trade field ownership, and cause field stability or field instability over time.

In the first paper of this thesis, I contribute to the understanding of hybrid organizing in impoverished and marginalized social spaces where the field structure is severely limiting disadvantaged social actors (the indigenous communities) who inhabit the field to gain ascendancy in it. For these actors, power struggles with the superordinated, politically and economically dominating field of power (i.e., the national field of Ecuador) are unlikely to be won unless the field structures become more empowering for them, or unless the marginalized social actors become empowered to re-structure the structures of the field by themselves. In this regard, the paper points to the promising role of transnationally embedded social entrepreneurs as potential change agents. Focusing predominantly on the hybridity of prosocial power, the paper shows how relatively powerless actors can be effectively enabled to change oppressive field rules and develop field stability when social entrepreneurs with a hybrid field embeddedness empower them to gain field ownership and a hybrid field embeddedness themselves. However, the paper also

demonstrates how social entrepreneurs, as theoretically enabling actors, can unintentionally exacerbate critical field instabilities in disadvantaged spaces if they are unable to effectively bridge disadvantaged fields with other fields to overcome field-specific disadvantages. Since social actors also possess a "sense of one's place" that reminds them of their societal belonging and group identity, but also of their limits in terms of "that's not for the likes of us" (Bourdieu, 1985: 728), social entrepreneurs can cause further field instabilities if they discover over time that a long-term presence in the harsh field conditions of their beneficiaries is too much of a challenge that eventually leads them to withdraw from their local activities. The empirical field where hybrid organizing takes place is consequently an arena of power struggles in which the multiple field connections of the social entrepreneurs and their beneficiaries produce constant tensions for which a hybrid field embeddedness of both the dominant and the dominated groups can function as a mitigation mechanism.

In the second paper of this thesis, I contribute to the contextual dimension of hybrid enterprise governance as an organizational, meso-level field that continues to be dominated by the capitalist system as an overarching field of power. Although Bourdieu highlights the organization as a distinct field that he addresses predominantly through empirical cases of educational organizations (Vaughan, 2008), most of his work is focused on the individual level (Fligstein & McAdam, 2011), while he is comparatively silent on the meso-level of analysis (Emirbayer & Johnson, 2008). Consequently, his theoretical apparatus has also found little application in the field of organization studies, which several authors bemoan as a mostly unexploited opportunity to advance organizational theory (Dobbin, 2008; Emirbayer & Johnson, 2008; Kerr & Robinson, 2009; Townley, 2014) – an opportunity to which the second paper responds. Considering that the field rules for hybrid enterprises (as primarily social value-driven actors) significantly deviate from those of traditional organizations (as primarily economic value-driven actors), the field of organizational governance becomes an important instrument for the management of the tensions that exist with other fields in the dominance hierarchy as well as with other organizational field players. In this regard, the paper contributes by showing how the field of politics can inform the establishment of hybrid organizational regimes in which traditional bureaucracy (associated with the economic pillar of hybrid enterprises) can be softened by hybridizing it with alternative ways of organizing. Since the literature has

considered few alternatives besides democracy, the paper contributes by discussing collegiality as another polycratic governance mechanism in which the power of social actors is decentralized.

In the third paper of this thesis, I contribute to the spatial dimension of hybridity by addressing the different migration directions of transnational social entrepreneurs across developed and less developed economies. In line with the first paper of this thesis, the third paper advances the knowledge base in relation to the hybrid academic field of transnational social entrepreneurship (Bolzani et al., 2020) as a nascent research direction at the intersection of the social entrepreneurship field and the transnational entrepreneurship field. Furthermore, it demonstrates how a hybridization of different field perspectives (such as the institutional void and the institutional support perspective on social entrepreneurship) can reveal new insights for the field of hybrid organizing. In particular, it shows how a hybrid, macro-level field-embeddedness across countries can facilitate and enhance social entrepreneurship even in disadvantaged contexts where the rules of the game would have otherwise inhibited it. This is because all fields are structures of power whose combination can generate new possibilities. However, since some national fields are more powerful than others, some field combinations are also more facilitative than others. To take advantage of the opportunities inherent across fields, it is necessary for social actors to incarnate the field as habitus.

6.1.2 Hybrid organizing in relation to habitus

The habitus consists of “systems of durable, transposable dispositions” that are formed through “the dialectic of the internalization of externality and the externalization of internality” (Bourdieu, 1977: 72). In other words, it is the embodied amalgamation of objective social structures and subjective personal experiences that guide the actions of social actors. Consequently, it is inextricably linked with the field in an ‘ontological complicity’ (Bourdieu, 1990a). While it is produced by the social world of social actors as an *opus operatum*, it also functions as the *modus operandi* that informs thoughts and actions for the reproduction of structures (Bourdieu, 1977, 1990a). Bourdieu has identified two subsets of habitus - a primary (most substantial) habitus from early life experiences, and a specific habitus from later life experiences (Bourdieu, 2000) - which makes the habitus itself a hybrid phenomenon. To analyze hybridity in the field of social entrepreneurship, I argue that this thinking tool can be

particularly useful to understand the power relations between social entrepreneurs and their beneficiaries as well as why the well-intended actions of social entrepreneurs often fail to deliver durable social impact and cause field instabilities for themselves and their beneficiaries. Furthermore, it can help to explore the success and failure of organizational actions of and within hybrid organizations.

As demonstrated in the first paper of this thesis, many social entrepreneurs arrive with a primary habitus from outside the field of their beneficiaries and often take little time to immerse themselves in the new field to develop a field-specific habitus before they start acting. However, rushing into a social space for which the respective entrepreneurs lack the cognitive and socio-political legitimacy is often a foolish decision (Aldrich & Fiol, 1994) that is likely to cause detrimental social impacts despite good intentions. This is because external social entrepreneurs inevitably arrive with a set of pre-reflexive, unquestioned attitudes from the outside world that might cause misrecognition of the 'rules of the game' in the fields of operation and may also lead them to unconsciously exercise a symbolic form of domination that inhibits the empowerment of their beneficiaries. Bourdieu (1977, 2000) refers to such intuitive, taken-for-granted opinions and shared beliefs as *doxa*, which he contrasts with the concept of *episteme* (knowledge). In this regard, the first paper breaks with the doxa "that prosocial organizing has positive societal impacts" (Wry & Haugh, 2018: 566). Instead, it argues that the more a social actor can reflectively internalize from the structures and experiences of a particular field into their habitus, the better the actor will be able to understand and navigate the field, resulting in context-sensitive prosocial practices. This is because only immersion in the field of action provides social actors with "the practical sense, or, if you prefer, what sports players call a feel for the game, as the practical mastery of the logic or of the immanent necessity of a game" (Bourdieu, 1990a: 61). Social entrepreneurs with a hybrid field embeddedness play a critical role in this regard if they are able to develop a specific habitus from the fields of their beneficiaries. However, based on the findings from paper one, I argue that the practical mastery of social entrepreneurship also requires social entrepreneurs to support their beneficiaries to develop a habitus that helps them to break out of vicious circles of poverty and marginalization by providing them with positive experiences and access to more empowering field structures. If disadvantaged social actors are not enabled to internalize the structures and

experiences from other, ideally more advantageous, fields, they will unlikely be able to break free from the reproduction of detrimental field structures, external domination, and what Bourdieu (1984: 101) describes as a “class habitus, the internalized form of class condition and the conditionings it entails”. However, a risk remains that empowered social actors are seen by comparatively less empowered fellow community members as *transfuges* who betray their class origin (Bourdieu, 2007), for example by refusing farm work or by renouncing former living conditions.

In relation to the second paper of this thesis, the concept of habitus must be applied to the organizational field. Because the habitus links the micro and macro-level, as well as past and present fields, Emirbayer and Johnson (2008: 4) propose that “attention to the role of the habitus in organizational life promises to shed considerable light on how organizational structure is built up from the micro-processes of individual behavior”. Following this line of thought, and considering the two definitions below, I argue that Bourdieu’s notion of habitus aligns particularly well with the concept of institutional logics, which I applied in the second paper of this thesis, and which has also found extensive application in organizational theory.

> **Habitus**: “The habitus, a product of history, produces individual and collective practices - more history - in accordance with the schemes generated by history. It ensures the active presence of past experiences, which, deposited in each organism in the form of schemes of perception, thought and action, tend to guarantee the 'correctness' of practices and their constancy over time, more reliably than all formal rules and explicit norms” (Bourdieu, 1990b: 54).
>
> **Institutional logics**: “The socially constructed, historical pattern of material practices, assumptions, values, beliefs, and rules by which individuals produce and reproduce their material subsistence, organize time and space, and provide meaning to their social reality” (Thornton & Ocasio, 1999: 804).

While institutional logics “provide the governing mechanism for a given field of institutional activity” (Mohr, 2013: 123), the habitus provides the governing mechanism for the activities of social actors in a given field. An example where both concepts have been combined can be found in an article by Spence and Carter (2014), who demonstrate how the habitus of organizational partners and senior accountants at four elite accounting firms has led to the creation of an organizational hierarchy in which a commercial logic became significantly dominant over a technical-professional logic. Since “each member of an organization brings to it a habitus formed under specific past conditions” (Emirbayer & Johnson, 2008: 4), the past

experience of organizational actors will have a critical influence on the success of organizational strategies. Using the second paper of this thesis as an example, hybrid organizations that seek to support macro-level shifts away from capitalist ways of organizing by implementing alternative, polycratic forms of governance might encounter obstacles if their organizational members' past organizational experiences are permeated by rational-bureaucratic governance models. This could lead to a hysteresis effect at the organizational level in which organizational actors are unable to make sense of changed organizational circumstances based on their habitus (Kerr & Robinson, 2009). In this regard, King and Land (2018: 1549) argued in relation to the polycratic concept of democracy that "[e]ven when people want democracy and equality, actually performing according to such norms will require often uncomfortable challenges to members' identities and values". Thus, hybrid organizing on the meso-level requires the organization and its members to allow for the develop a habitus that balances past and present organizational governance experiences with present and future actions by constantly and reflectively challenging their everyday practices. With regard to the second paper, this relates to the development of a hybridized habitus for social enterprises in which a polycratic logic can gain dominance over a bureaucratic logic.

Turning to the third paper of this thesis, a hybridization of habitus can be observed across national fields, where it can facilitate social entrepreneurship activities. Transnational migration functions as the enabling mechanism of the bi-national inculcation of field structures as it implies a dualistic - or sometimes even pluralistic - field embeddedness at the macro-level. Some research in the transnational entrepreneurship literature that also applied a Bourdieusian lens has associated a field-spanning embeddedness and the entrepreneur's ability to operate in two different geographical social spaces with the existence of a 'bifocality of habitus' (Patel & Conklin, 2009; Vertovec, 2004) or 'dualistic dispositions' (Drori et al., 2010; Guarnizo, 1997). In this sense, social actors develop their primary habitus in the field of origin and then develop their secondary habitus in the field of destination. Muhammad Yunus, for example, developed a primary habitus from his upbringing in Bangladesh, while he developed a secondary habitus from his later life experiences in the United States of America. His internalization of the field structures of both international contexts consequently formed a bifocality of habitus that enabled him to

effectively bridge both macro-level fields and establish a context-sensitive entrepreneurial solution that alleviated the suffering of millions of poor Bangladeshi people, especially women. Thus, the hybridization of habitus across fields can be regarded as an essential success factor for international social entrepreneurship activities and demands a lot more attention in the entrepreneurship literature.

6.1.3 Hybrid organizing in relation to capital

Capital in the Bourdieusian sense, with its social, cultural, economic, and symbolic types, which Bourdieu called 'species', represents the source of *power* that allows social actors to alter their position in a particular field (Bourdieu, 1977, 1986). It is the third essential pillar for a relational understanding of hybrid organizing in social entrepreneurship.

The notion of power has been subject to a longstanding discussion by major theorists in the social sciences. As an 'essentially contested concept' (Lukes, 1974), it is traversed by several different perceptions with both positive and negative connotations. On the bright side, power can be understood as a facilitative capacity (Giddens, 1976; Wrong, 1979) that enables social actors 'to get things done', 'to achieve goals' (Parsons, 1967) and to 'make a difference' (Giddens, 1984). On the dark side, and from a relational point of view, it is predominantly understood as a force of domination and dependence. Max Weber (1968: 53), for example, highlights the hegemonic face of power by defining it as "the probability that one actor within a social relationship will be in a position to carry out his own will despite resistance". In the coercive conception of Dahl (1957), power is the extent that social actor A gets social actor B to do something that social actor B would otherwise abstain from. And in the view of Emerson (1962), power is conceived by the extent to which one social actor is dependent on another social actor.

For Bourdieu (1998), power is a source of domination and symbolic violence that results from an uneven distribution of capital. Those social actors who possess the highest amount of valuable capital as "actually usable resources and powers" are also those who inevitably represent what he describes as the 'dominant class' in the field (Bourdieu, 1984: 114). What makes a particular type or combination of capital valuable, however, depends on the rules of the field where it is used. In contrast, symbolic violence refers to symbolic domination as an (often unperceived) form of violence that occurs when a dominant class, consciously or unconsciously, introduces

new social conditions or ways of being that reproduce an oppressive social order and cause social suffering to socially weaker societal groups when their “power of selection” is denied and remains misrecognized (Bourdieu, 1977, 1979; Bourdieu & Eagleton, 1992). Since much criticism of western development projects centers on this form of symbolic violence (Easterly, 2006; Peredo & McLean, 2013), I regard a better understanding of the power dynamics in social entrepreneurship as imperative to advance both theory and practice.

Building on the view that “power can be dirty, but it doesn’t have to be” (Battilana & Casciaro, 2021: 19), I regard an extension of Bourdieu’s theory as necessary to examine the contestation of power not only as a source of domination and symbolic violence but also as a positive force for the alleviation of the suffering of disadvantaged others. In the first paper, I have laid the groundwork for this by outlining the mechanisms of power that can facilitate prosocial success or failure in vulnerable social spaces. As exemplified in the paper, the field-specific capital of indigenous communities is often little valued in non-indigenous fields, while access to capital from the outside world is usually difficult to obtain. But also in other, non-indigenous social spaces, the disrespect of an actor’s capital endowments and an inaccessibility of external capital resources severely constrains the ability of all kinds of disadvantaged social actors to improve their detrimental field position on their own. In contrast to their beneficiaries, social entrepreneurs usually possess a surplus of internationally valuable species of capital. Although their intention is neither to dominate nor to keep their beneficiaries in a dependency relationship, their capital surplus inevitably makes them the dominant class in the field, which can also imply symbolic violence to their beneficiaries and unintentionally keep the latter dependent and dominated. To mitigate this domination and to facilitate emancipatory empowerment and independence, I argue that a carefully orchestrated process of capital exchange is needed.

Previous research has already highlighted the importance of reciprocal interaction and knowledge exchange processes between beneficiaries and outside actors for social change in deprived environments (Qureshi et al., 2018). As outlined by Marti et al. (2013: 14), “the absorption of new knowledge and new ideologies conveyed by external actors is the process through which community members eventually find the motivation to act for their rights”. However, I argue that it is crucial

that both social entrepreneurs and their beneficiaries are willing to socially invest in the ongoing dissemination and absorption process by transmitting, receiving, transforming, and incorporating new capital to become part of their habitus. Although the theory of practice regards economic and cultural capital as the two most important types of capital that enable social actors to alter their position in a social space (Bourdieu, 1986; Bourdieu & Wacquant, 1992), I argue that the bilateral dissemination and absorption of social and cultural capital are most important for the stability of the social entrepreneurship field, since such dissemination and absorption are a precursor for the sustainable generation of economic capital. For example, beneficiaries who are enabled to enter a new field (e.g., by working abroad) first have to be willing to absorb external social and cultural capital during their field experiences, which then feeds into their habitus and thereby enables them to escape from a dependency relationship and to generate economic capital on their own. Conversely, social entrepreneurs must also be willing to absorb social and cultural capital from the field of their beneficiaries to develop a habitus that enables them to generate context-sensitive and dominance-reducing solutions. Notably, such capital exchange is typically a lengthy endeavor since it is "a process of em-bodiment, incorporation, which insofar as it implies a labor of inculcation and assimilation, costs time, time which must be invested personally by the investor" (Bourdieu, 1986: 283). Here we also see the temporal dimension of hybrid organizing. Moreover, and despite the fact that the habitus of social actors is open to constant change and transformation in response to changes to field conditions and new experiences (Bourdieu, 1990a, 2000), inappropriate capital transfers and too rapid changes in the field conditions in which individuals are embedded can lead to a *hysteresis effect*, i.e., a disruption of the field and habitus relationship (Bourdieu, 1977), which Bourdieu observed as a cause of suffering in traditional communities (Bourdieu, 1979). Therefore, it is necessary for social entrepreneurs to engage in an ongoing, non-coercive, and reflexive capital exchange process that is carefully aligned with the pace of the field and habitus dynamics of their beneficiaries.

With reference to the second paper of this thesis, I argue that the Bourdieusian species of capital should be further leveraged to unfold their analytical value at the meso-level of analysis in order to develop a more fine-grained understanding of the unprecedented developments across the organizational landscape and the role of

social enterprises in it. Since capital exists not only as embodied field principles and in a symbolic state as habitus but also in an objectified state (Bourdieu, 1986), hybrid enterprises can be understood as the material representation of the competition for capital of the social entrepreneurs who operate them. However, considering the 'radical institutional shift' that is arguably taking place at the organizational level (Davis, 2016), and through which organizations are increasingly moving towards a 'New Normal' with less capitalistic and more cooperative modes of organization (Muñoz et al., 2020), the primacy that Bourdieu assigns to the economic field and economic capital must be called into question. Instead, social and cultural capital might take a more dominant position in the overall field of power in the future, considering the rapidly increasing prevalence of hybrid organizations. In this case, collegial governance, as a cooperative, collectivistic, egalitarian, and value- and knowledge-driven organizational regime can become particularly promising for organizations in which social and cultural capital has primacy. Bourdieu (1983: 318) has outlined the field of the arts as one exception where the economic world is already subverted by the rule of "art for art's sake". Although the field of social entrepreneurship does not purely operate for the sake of the social, it might also have the potential to turn the present economic world upside down.

In the third paper of this thesis, individual-level capital is related to macro-level field embeddedness. However, in line with the first paper of this thesis, the third paper uses the universal and less comprehensive notion of human capital, as it is much more widely recognized in the entrepreneurship literature than Bourdieu's capital species. Nonetheless, since human capital not only comprises the knowledge and skills of social actors but also their experiences (Becker, 1964), it connects particularly well to the Bourdieusian elements of cultural capital and habitus. The paper demonstrates that a hybrid field-embeddedness and an associated bifocality of habitus are insufficient for a comprehensive understanding of hybrid organizing across national contexts if the capital endowments of social actors are not considered as well. The paper contributes with a contextualized framework that indicates how the ability of transnational migrant entrepreneurs to operate a social venture can vary considerably across the same international contexts depending on whether human capital levels are high or low. However, due to the dialectic relationship in which "capital does not exist and function except in relation to a field" (Bourdieu & Wacquant,

1992: 101), actors can gain the necessary capital to run a social enterprise through an embeddedness in other fields. Especially in fields of institutional support, social entrepreneurs can find an abundance of supportive capital elements (Stephan et al., 2015), but even an embeddedness across institutional void contexts can facilitate access to capital that, if embodied as habitus and objectified as a social venture, enables the creation of a new social entrepreneurship field.

Based on the above, I argue that Bourdieu's theory of practice provides a highly useful analytical tool for a relational, multi-level perspective on hybrid organizing in social entrepreneurship and beyond. His trinity of field, capital, and habitus is particularly apt to capture the high complexity of the field in order to see it as an opportunity instead of a challenge.

6.2 Limitations and suggestions for future research

In each of the three papers of this thesis, I have already outlined a number of limitations and suggestions for future research in relation to the particular aspects of hybrid organizing. However, I would like to use the opportunity of this section to add a few points that concern the thesis as a whole and the Bourdieusian perspective in particular. This thesis has shed new light on different manifestations of hybrid organizing in the field of social entrepreneurship. However, these are only the tip of an iceberg that encompasses a much broader range of hybrid phenomena across contextual dimensions and levels that would be impossible to capture in one single thesis.

In the spatial dimension, I have predominantly focused on hybrid organizing across geographical fields by exploring the phenomenon of transnational migration. The field of migration is considerably underrepresented in the social entrepreneurship literature, despite the tremendous research opportunities it offers. While much is known about the influence of developed or underdeveloped spatial contexts on the functioning of social entrepreneurship (Stephan et al., 2015), field-spanning migration provides a whole new perspective, as it can facilitate social entrepreneurship in spatial fields where a mono-contextual embeddedness of social actors might otherwise inhibit it. Although the field of entrepreneurship research has increasingly developed beyond the long-prevailing focus on Western contexts and produced new enriching insights from all corners of the world, I argue that it required more insights from

phenomena where social entrepreneurship is bridging different contexts. Moreover, future research can go beyond physical migration and spatial embeddedness by also considering migration across virtual worlds and a social embeddedness in both physical and virtual reality. Hybrid organizing in 3D spaces and augmented realities such as the emerging 'metaverse' of Meta (formerly Facebook) might enable new ways for social entrepreneurs to enhance societal welfare. Moreover, future research could make new contributions to the spatial dimension by also considering how hybrid organizing can affect and construct spatial contexts. Baker and Welter (2017, 2020) elaborate on this by highlighting the important entrepreneurial activity of 'doing context' in contrast to passively experiencing it, which has been largely neglected by contextualized entrepreneurship research.

In the temporal dimension, future research can make new inroads by looking at hybrid organizing across the past, present, and future. This points to the importance of also considering 'time' for the advancement of entrepreneurship research (Welter & Baker, 2021; Zahra et al., 2014b). For research on hybrid organizing, I argue that it would be useful to examine activities between social actors with differing conceptions of time: linear and circular. It would also be desirable to study social entrepreneurship practices that bridge ancient and modern organizational principles or connect narratives of the past with future visions and actions. For example, Terjesen (2007) has outlined the case of an award-winning project in which a technological innovation was applied to an ancient rat-catching tradition of the indigenous Irula tribe by converting their blow-operated clay trap into a hand-operated steel trap that had higher efficiency and consequently produced more economic income for the Irula. However, while some (well-intended) modern innovations can enhance the circumstances of ancient communities, others will destroy ancient traditions and knowledge. Social entrepreneurship research that focuses on a hybrid balance between modern and traditional ways of organizing is therefore in high demand. Furthermore, and with reference to a recent article by Gümüsay and Reinecke (2021), which builds on the work of Erik Olin Wright (2010), I argue that it would be valuable for scholars to imagine desirable futures, real utopias (and dystopias), as well as possible alternatives to hybrid organizing for the years to come.

In the organizational dimension, research on hybrid organizing has made significant progress in recent years, considering a number of hybrid logics, forms, and

identities that are present within the organizational context (Battilana et al., 2017; Smith & Besharov, 2019). However, with new societal challenges and unprecedented institutional shifts in the broader business landscape in terms of ownership, value creation, and governance (Alvarez et al., 2020), the notion of the hybrid enterprise is expanding, while a cross-sectoral convergence is also underway. In addition to an increase in social enterprises as 'pure hybrids', more firms with a predominantly capitalist logic are becoming 'economic hybrids' by incorporating social principles of value creation, while more firms with a predominantly social or cooperative logic are becoming 'social hybrids' by integrating economic principles of value creation, making organizational hybridity the New Normal in the business landscape (Battilana et al., 2012; Berti & Pitelis, 2021; Muñoz et al., 2020). This provides researchers with numerous opportunities for future research on hybrid organizing, many of which were already outlined by Battilana et al. (2017), including a bridging across perspectives, levels, and methods, an integration of the types and degrees of hybridity, a stronger focus on mechanisms to manage hybridity, as well as on the performance implications of hybrid organizing. In addition, inter-dimensional and cross-disciplinary approaches were also highlighted as worthwhile since, e.g., temporal and linguistic dimensions can have a significant influence on the construction of spatial dimensions (Welter & Baker, 2021). While this thesis has responded to some of these calls, many questions remain. However, in addition to emphasizing the importance of developing new theories and concepts, I argue that future research on hybrid organizing can also benefit from digging deeper into already existing ground and by reviving phenomena that were previously marginalized, as in the case of collegiality.

In relation to the social dimension, Zahra et al. (2014b) and (Welter, 2011) have suggested that future entrepreneurship research should put a stronger focus on the network relationships between entrepreneurial actors, including interpersonal networks like family and friends, as well as network spaces such as ecosystems, clusters, and science parks. For hybrid organizing, this could mean studying social entrepreneurs with membership in multiple business incubators, accelerators, or industry clusters, and the benefits and challenges that arise from such hybrid affiliations. However, I argue that future scholarship would also benefit by looking at hybrid social dynamics between the entrepreneurial self and others. Yitshaki et al. (2021), for example, have examined how self-compassion and other-regarding

compassion function as internal enablers for prosocial opportunity recognition, while Branzei et al. (2018) have addressed how social entrepreneurs may perceive themselves in relation to specific others within the venture space.

With regard to the relational perspective applied in this thesis, I argue that an application of Bourdieu's theory of practice is highly useful for a comprehensive analysis and understanding of different phenomena within the field of hybrid organizing. Moreover, it makes it possible to overcome the paradigmatic dualism in entrepreneurship research in terms of methodological choices (qualitative versus quantitative) and ontological principles (subjectivist versus objectivist) (Tatli et al., 2014). However, instead of continuing to utilize only one or two legs of Bourdieu's tripod concept with its inextricably linked elements of field, capital, and habitus, future research should strive for a more integrated application of the framework. Moreover, while a holistic application of Bourdieu's entire theoretical corpus is virtually impossible, a stronger focus on additional, secondary concepts of his theory (e.g., illusio, doxa, hysteresis, class, conatus, or reflexivity) can add further analytical rigor, depending on the subject of study. In addition, since Bourdieu's theory of practice has several symbiotic overlaps with other major theories in the social sciences (e.g., structuration theory, institutional theory, network theory, imprinting theory, or human capital theory), its hybridization with such theoretical frameworks implies further potential to generate new theories and insights for hybrid organizing and beyond.

7 Conclusion

This thesis has explored different phenomena of hybrid organizing across different contextual levels in the field of social entrepreneurship and provided a relational perspective on hybrid organizing through a Bourdieusian lens. Similar to Bourdieu's theory, this thesis also evolved from empirical research in indigenous spaces and is essentially practice-related. It contributes to existing research in several important ways. On the micro-level, I have developed the concept of prosocial power to advance entrepreneurship research on the correlations of the bright and the dark side of prosocial organizing, demonstrating how prosocial power can function as a double-edged sword in the hands of social entrepreneurs who operate in vulnerable social spaces. Furthermore, I have shed new light on the implications of a multi-contextual embeddedness for social entrepreneurship and provided new theoretical insights for a better comparative understanding of transnational social entrepreneurs. On the

meso-level, I have expanded the emergent literature on hybrid enterprise governance by theorizing on the re-enchantment of collegiality as a previously marginalized approach to polycratic governance. To make the political collegiality concept applicable for the organizational context of hybrid enterprises, I have proposed an adapted version of the framework, while the empirical insights of the research provide new ground for the advancement of the institutional logics perspective along four analytical dimensions. On the macro-level, I have developed an institutional nexus perspective that links and extends the institutional void and institutional support perspectives of social entrepreneurship while it advances the nascent field of transnational social entrepreneurship. Overall, this thesis has further contributed to the Bourdieusian theory of practice by advancing its conception of power not only as a source of domination and symbolic violence but also as a potentially beneficial force for the generation of prosocial impact. Last but not least, it has extended the heretofore rare application of Bourdieu's theoretical framework at the organizational level and in the field of hybrid organizing. I hope that the insights from this thesis encourage future researchers to further advance the knowledge base in relation to hybrid organizing across fields and disciplines and to leverage the tremendous empirical and theoretical research opportunities it implies.

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Appendices

Table 7: Supplementary data for Paper 1

Core Element	Sub-elements	Illustrative Data
Socio-spatial context	TSE contexts	*Foreign TSE Green: I am actually born in Japan. My parents lived overseas for a while. … I lived way more than half of my life out of the United States.* *Foreign TSE Brown: I left South Africa and went to England for a couple of years … Then I went to Taiwan for a little while as an English teacher. Then I went to China for almost two years. And then I came to Ecuador.* *Domestic TSE Pink: I was in school in Germany for a year. … I studied in Portugal and in Ecuador as well.* *Domestic TSE Red: I am raised in Ecuador, I lived there my whole life, until I turned eighteen. Once I turned 18, I went to live in the United States. Then I joined the Peace Corps, went to Africa, went to West Africa, been there for two years in Guinea, doing agroforestry programs.* *Indigenous TSE Silver: I lived three months per year in Germany, over three years. In the US, in total, I think three years. And in Korea one year. In Italy one year. … After I moved from Korea, I came back to Ecuador.*
	ICM contexts	*ICM Puzu: [The community] is very deep in the jungle. We have our way of living in the jungle.* *ICM Ankas: What we live is different, and the way, the system we live, it is super different.* *Domestic TSE Red: They [the ICMs] don't have access to the education that some of lighter skin people have had. Many of the indigenous people have been born in difficult situations, with some health problems. Here in this region, there is a lot of alcoholism in the indigenous communities, so many of them have been marginalized by the government, without providing them with proper roads, proper access to education, health, electricity, drinking water.* *Foreign TSE Beige: There is a lot of paternalism here [in Ecuador]. … [ICMs] are seen as poor stupid Indians who stay in the countryside.* *Former Ecuadorian President: We have a large number of ethnic groups in the Amazon region and some are very few. For example, the Tagaeri or the Taromenane are few but there is also a community almost in danger of extinction, the Sápara.*
Capital	TSE Capital	*Foreign TSE Blue: We have access to foreign capital. And we also have access to foreign markets.* *Foreign TSE Brown: I am pretty well networked. I have quite a strong connection to the United Nations in Ecuador. And I have quite a good network with indigenous stakeholders.* *Domestic TSE Red: I network for a living. My networks are extensive.* *Domestic TSE Orange: It would have been impossible to create a business so quickly with so many growers with certifications and export if we didn't have capital at the beginning. So, we had an angel investor from day one.* *Indigenous TSE Silver: My mom used to work for the government. She had a lot of friends from the UN. And I had the chance of mingling at conferences and stuff. And then I moved to Quito to go to school. And I learned different languages.* *Domestic TSE Pink: I met these people [ICMs] since very, very long. You cannot clear my accent. My accent is deep, deep, deep rural and everyone is making fun of that in Spanish, in Quito.*

		ICM Yurak: Those who come from other countries are more developed, they are more prepared. *Foreign TSE Blue colleague Ben Cyan: I think for lots of entrepreneurial ventures it takes an outsider to see what the real opportunities are. Innovation comes from seeing opportunity that is not obvious or has not been there before and having the resources to put the pieces together.*
	ICM Capital	*ICM Puzu: For us, an understanding of the economic system that works in the world is very far. And mathematics, the counting of numbers, that is super far for us. … A point where we are going to say that we are also poor because we do not have money? That does not happen in the community. In the community there is no poverty, because there is no social class, … No one from that group has more, and nobody has nothing.* *ICM Waylla: Some [indigenous] have had businesses, but two or three years have passed and they close or mismanage. … We have seen that it has not worked. It is a lack of capacity. … For small micro-entrepreneurs, it is very difficult. Because we do not have capital, we also do not have knowledge, we need a lot of capacity, there is also a lot of bureaucracy, many documents… They [other ICMs] are dedicated to drinking instead of having some type of business that can help improve income, but they are not doing it because it is not their way of life, having businesses. They cannot run a business. For the same reasons: lack of education, training, all of this limits them being able to have some type of business. … The education level is decreasing because education is very expensive.* *ICM Yurak: Here we are Kichwa, we are a community, but we are not so economically developed. We are organized, but we are not so advanced.* *ICM Puzu: The elderly play a very important role to give advice* *Foreign TSE Blue colleague Ben Cyan: So many Ecuadorians don't think their traditions have value, so I think that's a little bit unfortunate.* *Indigenous TSE Silver: There is capacity within indigenous organizations to make real businesses. It is not because we are lacking certain stuff. If we are given the same opportunities, the same chances than other people, we can also be competitive and set up a company, set up a foundation and work towards whatever goal we are trying to accomplish.*
Experiences	TSE Experiences	*Foreign TSE Beige: My father is a wine producer, an agriculturalist in France. I lived for 17 years in a village of grape cultivation …. The whole economy of the village is based on wine. And with my 17 years, I went to uni and studied cellular biology and physiology.* *Foreign TSE Brown: I was born and raised in South Africa, in quite a rural part that is called Nelspruit. My father was a farmer, my mom was a housewife. I am very simple.* *Domestic TSE Pink: I was living in the countryside with my family. … A place where we need to clean our water, having no electricity, and close connection with nature. … I fell in love with nature, basically. … Our goal is to stop alleviate some of the poverty. This is our aiming.* *Domestic TSE Red: I went to Washington DC, and I worked there for two years at a Latin American Youth Center, which is a center for homeless and at-risk youth. … My parents always made an effort to making sure that we traveled. We stayed in hotels. We could afford better hotels, but we stood in hotels that were a lot cheaper. Just to attain that experience. And go camping, meet people in the streets and learn and eat in the marketplace with other classes of Ecuadorian people. I think this exposed me to always wanting to not be surrounded by rich people basically.*

		Indigenous TSE Silver: We were living in the community, but we were also having the benefits of Western society, through education. And then also in terms of being Kichwa, we learned Kichwa, we lived in a community. My parents really tried to have that equilibrium and to see how to give back to the community.
	ICM Experiences	*ICM Ankas: We are protecting the earth, protecting the ecosystem, the environment. We have always tried to produce, cultivate and improve the environment.* *Former Ecuadorian President: The Kichwa are much more assimilated than e.g, the Shuar, Achuar, or the Waorani. Some have preferred to stay in isolation because they were nomadic communities. So, for them, the concept of life, education, happiness, utility, is totally different from ours.* *Indigenous TSE Silver: For indigenous people themselves it's very hard to go up on the social scale. And it's been very difficult for decades for indigenous people to cut that barrier off. And what my family saw that only through education you can break that barrier and be part of society, Ecuadorian society, have a platform, to travel, you know. … For me, I feel like, my whole life I had to work three times harder just to be in the position where I am. Because I felt less advantaged in term of economically, socially, racially, because there was a lot of racial discrimination, there was a lot of social discrimination, and there were less resources, internally.* *Foreign TSE Beige: There have been projects by the Ministry of Agriculture and the Environment that made them [the ICMs] cultivate and nobody has bought. People say: "For what should I work if nobody will buy from me?".* *Domestic TSE Red: And on top of being marginalized there is serious issues with racism. There are many Ecuadorian people that mistrust and have negative stereotypes of indigenous people. They discriminate against them. There are negative stereotypes that they are all drunks, that they are lazy, that there is no way of changing the culture and that it is just a genetic thing. So, it is really hard and indigenous people struggle with jobs. And even those that do get education and that do further themselves in life and have more stability, they always gonna have barriers in the job business and also socially. People size them off. It is hard for them to be friends with the white people with power. So, it's a terrible situation and I feel like we are living in the old ages when racism was accepted here in Ecuador. It's a terrible situation.*
Social Distance	Potentials	*Foreign TSE Blue: The farmers that we work with were through networks of the field technicians that we hired, through their personal network. Family networks. And they were able to convince so many people to plant [the commodities to innovate new products].* *ICM Yurak: The companies [of the TSEs] do respect the custom of the Kichwas. Because the community, as a Kichwa community, has its statute. The company has to abide by what the community says, to comply and work. According to that we work.* *ICM Ankas: Now the companions [TSEs] are working directly with the families and with the people who want to work on the project.* *Foreign TSE Blue colleague Sophy Yellow: So, I would say that has always been a priority within the company and the foundation – establishing trust with the local communities. … We always had local staff accompanying us. The company, [Upano], they always hired, and still hire, local field technicians who have established these relationships with the communities.*
	Perils	*Indigenous TSE Aqua: They [the TSEs] do not know the reality of a community.*

		Indigenous TSE Silver: When I see organizations working with the communities, I see that they really have to learn a lot. They really need to understand the community life, how things work. *Domestic TSE Orange: When you go to the Amazon, if they feel that you have an accent from another country… it might be hard to enter the inner circle or to find the experts that would help you. Because there are very few experts.* *Foreign TSE Beige: The big problem for working in the communities is organization. It is very difficult to organize people.* *Foreign TSE Blue: I have also talked to people where they say: "well it's unfair that a gringo has to come to do this. Why can't we do this?" So, we can also create resent.* *Foreign TSE Blue colleague Ben Cyan: Well there is one of things where I think there is both appreciation and remorse. You know, you will talk to Ecuadorians who will say: "you know it's kind of unfortunate that we need these gringos to come to show us the value we have in our backyard."* *Former Ecuadorian President: Totally different paradigm, yes. So, a paradigm that is not theirs should not be imposed.*
Bi-directional learning	Potentials	*Indigenous TSE Silver: We [the ICMs and I] teach each other. That's the thing. No one is higher than the other. We are improving ourselves. And we are learning from each other.* *ICM Puzu: We are opening a door and explain to the world, to exchange knowledge of both the outside world and the world of the jungle. And that exchange will give us a way of understanding each other among humans.* *ICM Yurak: The exchange of experience makes us know much more. Little by little we experiment, and we apply that experience, because there are very important experiences. The ideas they give us are much better for us. Because here we are 100% Kichwa, we don't have much.* *ICM Ankas: We learn from them, and they learn from us. That is, we share ideas. … They appreciate our knowledge and we also appreciate their knowledge. And that is how the work begins. … In some way, we accomplish this work together.* *ICM Puzu: I am very happy. I am very grateful to all the people who helped me. I thought it was a very complicated situation for me, that I will not get ahead. But quite the opposite. I have learned many things about economics and I never had that experience of leading a project that has this sense of making money, ever. So, it has also opened many paths for me as a person, to see things in many ways, to understand.*
	Perils	*ICM Puzu: When you take a dollar bill and enter this house [of money], you entered that system, and it is very difficult for you to get out easily. Because your body, your knowledge, your needs are involved within that system and it keeps you in there and you cannot leave. But if you are strong and get out… and I went out… and I saw it from the outside. And when I saw it from the outside it was a giant house that was the economic system, which had thousands of doors. But if the person gets hooked there it is very difficult to get out of that super system.* *ICM Waylla: When they [the TSEs] open a market abroad, we always fall for them asking us for, let's say by tons, 2 tons, 3 tons. Then they [the ICMs] have to prepare 10 hectares to plant plants. I would prefer a demand that indigenous people can drive. Because if they ask for more, that's where they [the ICMs] don't have the capacity. And the forests are also damaged.* *Indigenous TSE Silver: There is always this disruption between the business side and the community work. How can we make that work together? Complementary, one and the other.*

		Indigenous TSE Aqua: I have recognized that in the communities there are many projects that finance, provide training, serve as experience. But in the end, nothing works. *Foreign TSE Brown: Maybe there is a little bit of resentment sometimes because they are not doing it, just seeing the outsider doing it.* *ICM Puzu: In the jungle, we are defining some ways of understanding this process of money as it enters our culture, our cosmovision. Because until now it enters, but it leaves. It does not stay in our world. Money enters the world to the city and it disappears. People get paid and go to the city. They spend it and return to their community with nothing, and nobody has anything, and we have not seen a change in the community.*
Reflexive impact measure-ment	Potentials	*Foreign TSE Brown: But I also at [my former organization] we were doing things like not the best way. There were better ways to do things and I saw that a really important thing that was being neglected was that local stakeholders were not driving these projects.* *Indigenous TSE Aqua: I was working in a Kichwa village. … The interference of the [community] leaders did not allow me to make my business decisions. … In the end, I gave up. I said, "it doesn't work here." … That experience was very enriching for me, the failures that I had. I went outside to see another business model, how can I do the same, but in another way.* *Foreign TSE Green: You have to be very conscious bout your own state of emotions.* *Domestic TSE Orange: I think that understanding the reality of the country as such is important. Then the language is also important. … Maybe if [the product] grows as much as we hope, maybe growers want to do monocultures and they start chopping down local lands. We don't want that because if they do that the Amazon is being chopped down.*
	Perils	*Domestic TSE Orange: They are so happy, and they really love to follow our rules and standards because we pay a lot.* *ICM Ankas: For what they [some NGOs] do, they think what they do is good. But for us it is bad. So, we try to integrate that knowledge and improve all that in some way.* *Foreign TSE Blue: That's just what people do all the time. It's because people get excited. … And I know because I did the same thing. … Like "oh let's go plant trees". … Sometimes the whole idea of reforestation is absurd. Sometimes people get those crazy ideas and they don't know what they are talking about, but then they get raised money because they are f*#*ing white, rich people. … Most of the time, those types of projects don't work. Because nobody actually takes care of the trees. There has to be an economic transaction.*
Socio-spatial Dominance	Potentials	*Indigenous TSE Silver: I have two people from the community that are working with me. … And the idea is that more of the people from the community can be doing that. Another lady from the community has just stepped out. And now she does her own business on the side. … The ultimate goal is to give capacity and empowerment to the women in the community. So they can do their own thing. They don't need to be managed by us.* *ICM Puzu: We plan to send a student from here to the United States. … So that they are analyzing life in the United States from another angle. Because that is what is going to open up a new way of doing education.* *Former Ecuadorian President: It is important to give them [the ICMs] the opportunity to take their destinies in their own hands. Because the topic of assistance is also very complex. Because later this generates a permanent dependence on the support of a*

		foundation or a company. But as long as they need it the state will also have to support. *Foreign TSE Green: Our business employs today around 70 people, most of them are local people. Most of these local people. Before they were working in the business, they were on their farms, on their land, quite frankly involved in some activity that had to do with the conversion of the forest. … The community people have aggressively taken on more of the business responsibilities. Which has been really fantastic.* *Foreign TSE Blue: Through the Fair Trade Social Premium Fund we make payments to farmers, and farmer groups. Which to date have been a little bit over a hundred thousand dollars. And that really is focused on creating a spirit of working together in associations and trying to push the social inclusion of farmers. Being able to create these associations. Creating their own plant. How to create capacity. Be able to be entrepreneurs. To be able to make more money out of other products as well. Right now, one of our focus is to include more local people on our staff and in our management. Especially for the board, trying to open that up and have more Ecuadorians and indigenous on the board. And then at the same time, over the past few years we started hiring more local people.* *Domestic TSE Pink: Five years ago, or four years ago, these people didn't have roads, didn't have a bridge, didn't have tourists, they were absolutely unknown and now they are proud, dressing up, because they are proud of themselves. They are recovering their identity. Now they know that their identity is important.*
	Perils	*Indigenous TSE Silver: I think that is the problem with a lot of people who do not come from the communities. They just want to set the rules and the goals, and they have the resources.* *ICM Puzu: They have pushed us to open the knowledge of our world for the modern world. But not everything. Some things.* *ICM Ankas: They take our knowledge to other places and sell it. We do not want that. So the participants were generating money or income for them.* *ICM Waylla: I have heard about [the company of Foreign TSE Blue] that they are appropriating. There is a lot of foreigners that have taken things that they are going to patent. … Those who work the most earn the least.*