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The Role of Boundary Work in Organising

Laura Fey

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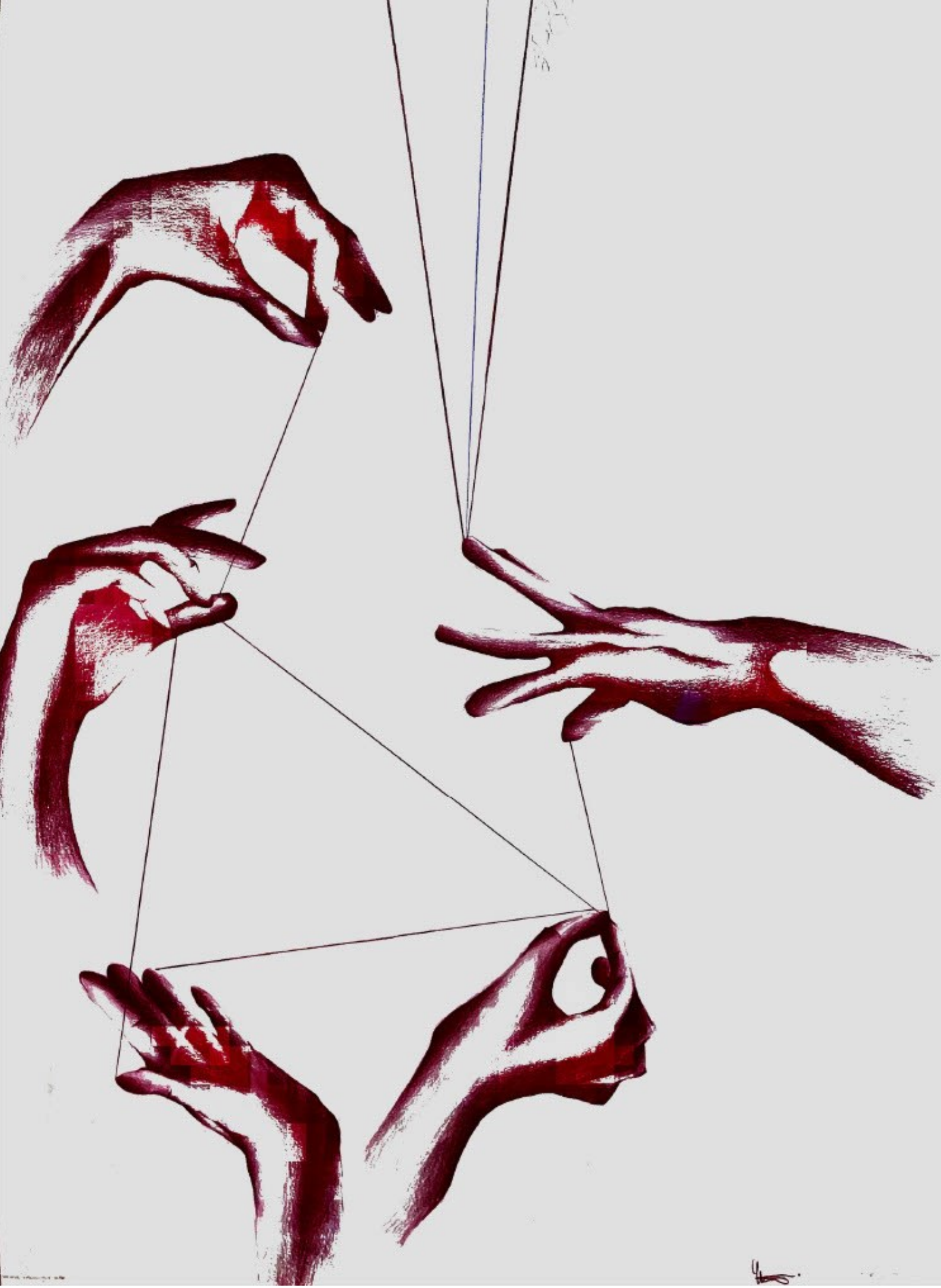

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ABSTRACT

My thesis examines the role of organising and boundary work in organisations. Empirically, this research project is situated in two contexts: a) in Germany, understanding the role of organisational structures in the Volkswagen Emission Scandal and b) in Edinburgh, exploring the organisational structure of the Edinburgh Festival. Theoretically, I draw on the boundary work literature as my lens as well as literature on organisational design, wrongdoing and mission management. Using a boundary work perspective, I have been examining how organising influences outcomes that can either enhance or hinder organisational performance.

The three papers are organised in the following way:

In Paper 1 (see Chapter 4), I explore how the structure of an organisation can lead to wrongdoing. I find that a combination of socio-cognitive, horizontal, and vertical boundaries can create an infrastructure of organising that permits organisational wrongdoing, prevents it from being challenged, and ultimately normalises it in everyday activities. By developing a theoretical understanding of the role of socio-cognitive boundaries, I provide novel insights into how organisational structures can lead to wrongdoing and how organisations and their actors can overcome it.

In Paper 2 (see Chapter 5), I analyse how an organisation managed to cultivate a dynamic interplay between two seemingly contradictory forces, competition, and collaboration, through its organisational design. I find that in the case of the Edinburgh Festival, competitive collaboration has emerged as a defining characteristic. My study contributes to the theoretical understanding of organisational design and boundary work, offering valuable insights into this unique phenomenon. By developing a theoretical framework about the Festival Organisation that depicts the structural arrangements and explains how competitive and collaborative boundary work can take place at the same time, I provide insights into the design of festivals and the broader management of organisations.

In Paper 3 (see Chapter 6), I examine the emergence of boundaries and organisational structures that support mission management in organisations. I address the question, “how can organisational structures facilitate the simultaneous pursuit of different organisational missions?”, using a boundary work lens. My study allows me to examine how the organisational structures of the Edinburgh Festival supported the organisation in maintaining its various missions without leading to mission drift. One preliminary key insight is that boundaries play

a pivotal role in creating temporal frameworks that define the organisational structure regarding communication and meeting possibilities.

LAY SUMMARY

Organisations are based on structures. These structures can influence the organisation positively and negatively. The role of structures can become visible through the performance of the organisation, the role and understanding of employees as well as the impact on society in which these organisations interact. My thesis looks at how we can understand the consequences of organisational structures to support organisations and individuals in making decisions that lead to the purposeful and positively perceived use of organisational structures. The thesis is organised in three papers (Chapter 4, Chapter 5 and Chapter 6) that apply the same theoretical perspective to shed light on the role of organisational structures in organisations.

In the first paper, I explored the role of organisational structures in decreasing conversations between organisational departments and individuals. I applied one theory to highlight reasons that explain how organisational structures can lead to silo thinking, decrease communication and ultimately support the occurrence of wrongdoing. I found that organisational structures can lead to competitive behaviour between departments and individuals and that – especially if in place for a long time – departments and individuals develop socio-cognitive boundaries that reinforce silo thinking and not talking to each other. It is therefore important that we take socio-cognitive boundaries into account when we want to understand how strong organisational structures in the form of physical distances, hierarchy levels etc. influence the outcome of the organisation.

In the second paper, I analysed the working together and competing of different organisations. I understood that the role of organisational structures influences how an organisation is performing and can encourage - together with external factors - how the organisation copes with different demands over time as well as different aims of individual organisational members. Based on my findings I developed a theoretical framework that supports researchers and managers in understanding the components of complex organisations to engage in collaborative and competitive work.

In the third paper, I analysed the role of time on balancing different interests within an organisation. I am using the same theory as in the two other papers to understand how organisations can stay successful in terms of their outcomes and the satisfaction of different members while considering their very different opinions and approaches. I was able to see that it can be very helpful for an organisation to set time periods to reflect on their work as well as to use other time periods to get things done and work on visible results. I gained insights into

the processes that help an organisation to use time for their benefit and I help researchers to understand the concept of balancing different interest in organisations in more detail.

DECLARATION OF ORIGINALITY

This thesis has been submitted in fulfilment of the requirements for a postgraduate degree (e.g., PhD, MPhil, DClinPsychol) at the University of Edinburgh. Please note the following terms and conditions of use:

I declare that the thesis has been composed by myself and that the work has not been submitted for any other degree or professional qualification. I confirm that the work submitted is my own, except where work which has formed part of jointly-authored work have been explicitly indicated below. I confirm that appropriate credit has been given within this thesis where reference has been made to the work of others.

The work presented in Chapter 4 was previously published in Research on the Sociology of Organisations as a co-authored book chapter by student Laura Fey and John Amis as 1st supervisor. This study was conceived by all authors. The majority of the work, including the data collection, data analysis and most of the writing were conducted by Laura Fey.

The work presented in Chapter 5 has been co-authored with John Amis as 1st supervisor and Royston Greenwood as 2nd supervisor. This study was conceived by all authors. The majority of the work, including the data collection, data analysis and most of the writing were conducted by Laura Fey.

This thesis has been composed by Laura Fey.

Signed in Edinburgh on 26th of January, 2024

Laura Fey

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LIST OF ABBREVIATIONS

AR	Annual Report
cf.	Compare
e.g.	For example
HR	Human Resource
VW	Volkswagen

The Role of Boundary Work in Organising

CHAPTER 1 - INTRODUCTION

A key focus in organisational theory involves recognising distinctions in organising and explaining their implications for organisational outcomes (Hinings & Meyer, 2018). Early studies explored how particular bureaucratic designs enabled or hindered innovation (e.g., Burns &. Stalker, 1961), and how those arrangements were shaped by particular 'contingencies' (Donaldson, 2001). Burns and Stalker (1961) examined how bureaucracies, characterised by rigid, hierarchical structures affected an organisation's ability to adapt to changes and introduce innovative practices. More recent studies have explored diverse organisational designs, including professional partnerships (Morris & Empson, 1998; Greenwood, Hinings & Brown; 1990), family businesses (Micelotta & Bendedetti, 2023), refugee camps (de la Chaux & Haugh, 2020; de la Chaux, Haugh, & Greenwood, 2018;), temporary organisations (Bechky, 2006; Jones, 1996), and social enterprises (Battilana & Dorado, 2010; Pache & Santos, 2010) and how they help achieve distinct outcomes.

All of these organisational designs involve unique structures and challenges that set them apart from each other. This necessitates specialised research to understand how each of these designs operates and succeeds in achieving their respective outcomes. Many of these organisations have to balance multiple, sometimes conflicting, goals (e.g., social and economic objectives in social enterprises) and have a broader societal or community impact. This could be in the form of providing specialised services (e.g., professional partnerships), contributing to local economies (e.g., family businesses), addressing humanitarian needs (e.g., refugee camps), achieving specific missions (e.g., temporary organisations), or advancing social causes (e.g., social enterprises).

Organisational design is understood as encompassing the intentional arrangement and configuration of structures, hierarchies, and work within an organisation to achieve specific outcomes (cf. Mintzberg, 2023). Organisational structures are the formal frameworks, roles, responsibilities, and relationships within an organisation (Ranson, Hinings, & Greenwood, 1980). Within those structures, hierarchies designate levels of authority and decision-making in organisations (Mintzberg, 1979) that affect the interaction between individuals. Those structures are enacted daily through the actions of individuals and groups that constitute the purposeful work performed to change, maintain, and configure organisations (cf. Lawrence & Phillips, 2019). While previous work has focused more on the structural arrangements. I am applying a boundary work lens, which allows me to develop a more dynamic understanding of

how organisational design is enacted in organisations. I am interested int the why, how, and whom of organising.

The why questions, which I ask in my thesis focus on the purpose of organising efforts by the organisations I study, here the importance of organising within a specific context is important. For example, organising can ensure that activities are carried out in a structured manner. As such, the why question provides insides into the coordination, decision making and adaptability of organisations. The how question details the methods and practices employed to organise. Here I examine how organising is achieved, looking at the mechanisms and practices employees employ in the organisation to achieve a specific outcome. And lastly, the whom question of organising contextualises the organising process within its broader social environment. With the whom of organising I focus on the individuals, teams and organisations that are affected by the designed organisational structures and processes. Overall, the why, how and whom questions are interconnected, addressing the purpose, implementation, and societal implications of organising and are as such important to develop a holistic understanding of organising.

To go into further detail, in my thesis, I am looking into how organisations can be designed to achieve important outcomes. Specifically, I focus on how individuals' work within organisations is affected by and affects the structures that they are embedded in, and how this interaction with the structures ultimately affects organisational outcomes. To do so, I draw on the lens of boundary work. Boundary work emphasises the roles that individuals and teams can play in the design, and maintenance, and change of organisational structures. Through understanding organising and effectively utilising boundary work, individuals and teams can, for example, design organisations to foster collaboration, create healthy competition and balance differences among heterogeneous organisational members. Therefore, a boundary work lens allows me to focus on daily enactment in organisations. I am using boundary work to examine organising for collaboration, competition, and wrongdoing.

The two main mechanisms through which the observed boundary work is achieved, are time and space. By paying attention to the special and temporal component of organising, I enhance our understanding of how organising affects the boundary work and actions taking place in organisations as well as how organising can be amended to achieve different outcomes. This may help us to better understand unintended outcomes (such as organisational wrongdoing) as well as how to purposefully adjust structures to achieve organisational goals.

A Boundary Work Perspective on Organising

Boundaries are defined as ongoing, situated constructs that are transformed through social interactions and practices among various actors over time (Gieryn, 1983). Boundary work has its roots in a social construction ontology with actors as active agents in the co-construction of boundaries through negotiated interactions within and between organisations (Nippert-Eng, 1996). As such, boundary work involves the processes and activities undertaken within an organisation to negotiate roles, teams, responsibilities, and interactions. Boundary work allows me to examine organising by analysing organisational structures, hierarchies, and actions of individuals and groups as the outcomes of organising.

There are three main types of boundary work: collaborative, competitive, and configurational (Langley, Lindberg, Mørk, Nicolini, Raviola, & Walter, 2019). Collaborative boundary work emphasises cooperation and mutual understanding among different individuals or groups within an organisation. It involves the deliberate effort to bridge gaps, share information, and work collectively towards common outcomes. This category of boundary work is particularly useful when there is a need to understand cross-functional collaboration, interdisciplinary projects, or when different departments or teams must align their efforts (Lawrence & Phillips, 2019; Zietsma & Lawrence, 2010). It encourages open communication, knowledge exchange, and the pooling of resources. For example, research into collaborative boundary work has examined healthcare organisations, focusing on the interactions among medical practitioners, nurses, and administrative staff, to ensure seamless patient care to establish clear channels of communication and coordination to optimise healthcare delivery (Rodriquez, 2015; Haland, 2012; Allen, 1997).

Competitive boundary work involves establishing distinctions, competition, and a sense of differentiation among various groups or entities within an organisation. It often involves asserting boundaries to protect the interests of resources (Bucher, Chreim, Langley, & Reay, 2016; Santos & Eisenhardt, 2005; Gieryn, 1983). Research in this stream interrogates how and why boundaries are created and generate points of distinction and belonging. The literature has focused mainly on situations involving competition for resources, recognition, or influence (Lefsrud & Meyer, 2012; Arndt & Bigelow, 2005; Suddaby & Greenwood, 2005).

Configurational boundary work focuses on the broader design and structuring of the organisation. It involves making deliberate choices about how the organisation is structured, including the division of labour, reporting relationships, and the allocation of resources (Cartel, Boxenbaum, & Aggeri, 2019; Howard-Grenville, Nelson, Earle, Haack, & Young, 2017;

Stjerne & Svejenova, 2016; O'Mahony & Bechky, 2008). This category of boundary work is crucial when an organisation is undergoing significant changes or transformations. It helps determine the optimal configuration of departments, teams, and functions to align with the organisation's outcomes.

As such, competitive, collaborative, and configurational boundary work provide different perspectives on interactions in organisations. The Boundary work lens, therefore, sheds light on the dynamic interplay between individuals and groups, ultimately influencing how organisational structures can be reinforced and/or changed to achieve specific organisational outcomes. For example, a boundary work lens can reveal how distinct groups within an organisation negotiate their boundaries, shaping interactions and collaborations and deciding with whom to communicate and with whom not (cf. Langley et al., 2019). Examining organisational structures through a boundary work lens can therefore provide important insights into how roles are defined, conflicts are resolved, and coordination is achieved.

Organising and Wrongdoing

Scholars, investigative journalists, organisational whistle-blowers, and members of the public have examined the consequences for individuals, businesses, and society of organisational wrongdoing. Focusing on concepts and causes of wrongdoing, leadership styles, individual decision-making (e.g., Starbuck & Milliken, 1988; Rosa & Vaughan, 1997; Sims & Brinkmann, 2003) and influences of the contexts in which organisations operate (e.g., Gabbioneta, Greenwood, Mazzola, & Minoja, 2013; Augier, March, & Sullivan, 2005) have all been investigated. This work has generated important insights into the frequency, scale, and complexity of wrongdoing.

However, we have less insight into how internal organisational structures and systems might lead to wrongdoing. This is an important lacuna in our understanding because we know that how structures and systems develop, and the corresponding cultures that arise, heavily influence how organisations, and the individuals within them, view the world around them and incorporate understandings of what is valued, appropriate and normal. Thus, while it is not surprising that work has pointed to the importance of this for our understanding of wrongdoing (e.g., Gaim, Clegg, & Cunha, 2021; Clemente & Gabbioneta, 2017; Palmer, Smith-Crowe, & Greenwood, 2016; Gabbioneta et al., 2013; Kish-Gephart, Harrison, & Treviño, 2010), our understanding remains at a nascent state.

In order to define wrongdoing, I draw on Palmer et al.'s (2016: 1) definition of behaviours that can fall into three categories: "violations of criminal, civil, and administrative law; transgressions of explicit industry and professional codes; and contraventions of less codified organisational rules, social norms and ethical principles." Organisational wrongdoing can be cast into three main levels. First, there is work at an individual level that examines how organisational members, from the CEO down, make corrupt decisions (Jensen, Potočnik, & Chaudhry, 2020; Schnatterly, Gangloff, & Tuschke 2018; Lavena, 2016; Nayir & Herzig, 2011; Sims & Brinkmann, 2003; Rosa & Vaughan, 1997; Starbuck & Milliken, 1988). Second, investigations have uncovered wrongdoing as a consequence of organisational actors failing to do things in a certain way (Gaim et al., 2021; Vaughan, 1997; Near, Dworkin & Miceli, 1993; Vaughan, 1989). Third, a body of research details how people work in organisations and how this can lead to wrongdoing (van Rooij & Fine, 2018; Clemente & Gabbioneta, 2017; Palmer et al., 2016; Dempsey, 2015; Gabbioneta et al., 2013; Balch & Armstrong, 2010; Kish-Gephart et al., 2010).

As the understanding of organisational wrongdoing as a common phenomenon has developed, so it has become more broadly understood that power structures, administrative systems, specific social influences, culture, and incentive systems can lead not just to positive ways of working but can also give rise to wrongdoing (Palmer, 2013). Thus, it appears that organisational wrongdoing emerges from the systemic nature of organisations, their structures and how they are set up. In this case, it is possible that wrongdoing emerges as a consequence of how organisations are designed. However, we do not know how these structures are set up (Palmer et al., 2016). The impact of organisational design on organisational wrongdoing has been underemphasised so far.

Thus, in Chapter 4 I assess German car manufacturer Volkswagen's (VW) design factors, ranging from power structures to subunit arrangements to situational social influence processes (Palmer, 2013), and consider how they may have contributed to the firm's widely reported wrongdoing. I have found that the design of the organisation was partly responsible for the wrongdoing taking place and that the boundary work employed was further supporting silo thinking and competition that led to the emission scandal. Specifically, the dynamic interplay between competing departments and their members can be based on competitive boundary work and lead to the development of silo thinking and ultimately wrongdoing (Chapter 4). Lastly, I focus on the reforms that VW instituted to address the wrongdoing and to change the organisational design. I developed my understanding of the influence boundary work can have

on organisational actors and the importance of organising for the success of a large, multinational cooperation. As such, boundary work introduces more agency into the relationship between organising and wrongdoing (as the focal outcome), this adds to the more recent conceptualisations of wrongdoing as socially constructed (cf. Roulet & Pichler, 2020).

Organising and Mission Management

Research on mission management often focuses on how mission statements (Grimes, Williams, & Zhao, 2019; Bartkus & Glassman, 2008) influence organisational behaviours and objectives. To study missions, most emphasis is placed on hybrids and social enterprises (cf. Battilana & Lee, 2014). Missions involve the essential and recurrent patterns of actions that mirror the values and purposes of the organisation (Ometto, Gegenhuber, Winter, & Greenwood, 2019). This suggests that missions are not isolated events but rather ongoing activities.

Organisations face a growing demand for pursuing multiple missions (Grimes, Williams, & Zhao, 2019). This increase of multiple missions can lead to the risk of one mission dominating another, called mission drift (Jones, 2007). To prevent mission drift and achieve these different missions successfully, the design of the organisation is important (Pache, Battilana, & Spencer, 2023). How an organisation is structured and organised is relevant to how successfully they pursue their missions. As such, organising is a key factor in facilitating multiple missions. However, the ways in which different missions can be sustainably pursued over an extended period remain ill-understood. This makes the study of organising approaches that influence mission management particularly interesting.

In Chapter 5, I explore this by examining how an organisation is created. I am focussing on the Edinburgh Festival, the second largest ticketed event in the world. While the individual Festivals were founded from 1947 onwards, the Festival Organisation as it is known today was founded in the 1990s, officially becoming the Edinburgh Festival Organisation in 2006. The Edinburgh Festival provides a fascinating organisational form that differs from what I had been studying on organisational theory classes and reading in academic papers. As such I wanted to understand its way of organising. I found that the organisation has developed mechanisms that allow them to pursue competition and collaboration in a sustainable balance, while also managing a large festival with a comparatively small number of managers. In Chapter 6, I further demonstrate the effective utilisation of the Festival Organisation's design to enable their simultaneous execution of diverse missions. The focus is on facilitating the coexistence of multiple missions without the need for trade-offs or impeding the individual progress of each

distinct objective. Through this work, I highlight how organising can streamline operations to accommodate various missions concurrently, ensuring that they progress without hindrance.

Organising and Temporality

The concept of time, encompassing both objective ("clock") time and the subjective experience of time, stands as a crucial element in understanding the progression, development, learning, and transformation of organisations and organisational actors (Shipp & Jansen, 2021). Following Reinecke and Lawrence (2023: 642) I understand temporality as "negotiated" by organisations and their organisational members. These actors construct time through project deadlines, milestones as well as their daily routines. In this context, time is not only an additional element of organising, but it is central to the work that takes place through the creation of deadlines, routines, and timelines that actively constitute organisational structures (Hernes, 2014).

The concept of temporality is vital for organisational design, impacting structures and coordination within organisational settings. The complex nature of time and its influence on organisational strategy challenge implicit assumptions about, or definitions of, organisations. As such, temporal aspects can be categorised into three primary domains. First, there are varying interpretations of time, such as event time or clock time. Second, there are different roles of temporal elements ranging from sequencing to rhythm. Lastly, there is an exploration of how organisations employ and manage time (Kunisch, Bartunek, Mueller, & Huy, 2017). An important element of temporality in organisational design is the understanding of both short-term and long-term perspectives. Short-term considerations may involve immediate operational efficiency and responsiveness, while long-term perspectives require an organisation to anticipate future trends, plan for sustainability, and foster innovation. Striking the right balance between these temporal dimensions is essential for a resilient organisational design and success in a rapidly changing business landscape.

Although temporality is important for organisations, we have fewer insights into how organising and time are used in organisations to achieve collaboration, bring different organisational units together or influence the participation of organisational members (cf. Reinecke & Lawrence, 2023). It is important, therefore, to acknowledge the significance of time, as highlighted in the literature on time and temporality (Schultz & Hernes, 2020; Reinecke & Ansari, 2015; Orlikowski & Yates, 2002; Fine, 1990). Time is consistently present and has an impact on the design of organisations.

Weick (1979) characterised organisations as entities resolving uncertainty in an enacted environment through repetitive, reciprocal activities, displaying contingent behaviour that develops and is maintained among actors. These activities constitute boundary work within the organisation. Within an organisation, actors constantly and simultaneously enact and reinterpret temporal categories in action (Hernes, 2014). Different organisational groups are likely to have different assumptions and concepts of time. Acknowledging and adjusting to the temporal aspects of these organisational structures becomes vital for organisations aiming to flourish in a landscape where cooperation and shared activities extend beyond conventional organisational boundaries. This reflects the growing trend of activities transcending individual organisational boundaries (Sinha & Van De Ven, 2005). In Chapter 6, I build on the insides of Chapter 5 and explore further the organisational design of the Festival Organisation. With eleven different festivals with individual temporal rules at play, I observe how different organisational members interpret time. I further examine how time accounted for in the design of the organisation can be used to create organisational structures, which allow different organisational members with different understandings of time to work together.

Conclusion

Applying a boundary work lens to understand the relationship between organising and organisational outcomes sheds light on the dynamic understanding of how organising takes place. The empirical context of two conceptually different organisations, a traditional corporation and a festival organisation, allows me to bring out nuances of the work that goes on within and across organisational structures. Following the terminology of Burns and Stalker (1961) the traditional corporation portrait in Chapter 4 is very much a mechanistic organisation structure, while the Festival focussed on in Chapter 5 and 6 can be understood as an organic organisation structure. These organisational structures contrast in their approaches to decision-making and adaptability to change.

First, in the case of Volkswagen, the mechanistic organisation structure shows through clear hierarchies, centralised decision-making, standardised processes, a set division of work into areas and departments as well as a relatively stable environment the organisation operates in. Decision making is situated at the top of the organisation, with protocols being followed for the exact execution of tasks. Due to the clearly defined roles, employees work in their designated area of expertise and would seldomly take on other tasks. The rigid structure of the organisation ensures consistency and reliability for the production processes of Volkswagen. As a result of this mechanistic structure, the organisation can face difficulties to innovate quickly as well as

to react fast and agile to change. If change is required, it needs to undergo hierarchical approval processes. Norms and processes that are in place can lead to resistance against change. While the mechanistic structure allows Volkswagen a high efficiency in maintaining specific quality level and production targets, the adaption to a fast-pacing environment appear difficult and can lead to pressure in the organisation.

Second, in the case of the Edinburgh Festiva, as an organic organisational structure, decentralised decision-making, fluid hierarchies, and processes are less formalised as the organisation operates in an in-stable environment. The organic organisation has a permanent need to adapt. The decentralised decision-making process enable individuals and working groups to respond to changes, for example audience preferences and logistical challenges. The fluid hierarchies, support the exchange between the individual festivals and working groups and allow for collaboration across festivals. As a result, the individual organisational members feel ownership and they are empowered to contribute to the Festival Organisation and drive its development.

The case studies of the mechanistic organisation of Volkswagen and the organic organisation of the Edinburgh Festivals allow me to bring further theoretical insights to the rich literature on organisational design and its centrality to our understanding of organising by analysing the how and why organisations function in particular ways. Based on these two cases, I show that while a specific type of boundary work may often be predominant, other forms can also exist. For example, depending on the organisational design they can flourish and lead to a productive tension between competition and collaboration, which I call ‘inspirational competition’ (Chapter 5). Additionally, as I show in Chapter 6, engaging in temporal boundary work, which involves arranging and buffering tasks within organisations, can result in the simultaneous coexistence and successful pursuit of multiple organisational missions.

As a result, Chapters 4 to 6 highlight that time and space are often the mechanisms through which organising takes place. Understanding the dynamics of boundary work and organising is pivotal to understanding how organisations can achieve important outcomes, such as inspirational competition. A boundary work lens offers a comprehensive view of organisational structures as dynamic entities, constantly shaped and reshaped by the interactions of individuals and groups within a broader organisational context.

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CHAPTER 2 - RESEARCH SETTING

The research of my thesis is conducted in two different empirical settings. First, in Chapter 4 I study the role of organisational design at VW, a large German automotive company. Second, in Chapter 5 and Chapter 6, I examine the role of the organisational design of the Edinburgh Festival, the second largest ticketed event in the world after the Olympic Games. The lens of boundary work is applied throughout all three papers.

Volkswagen

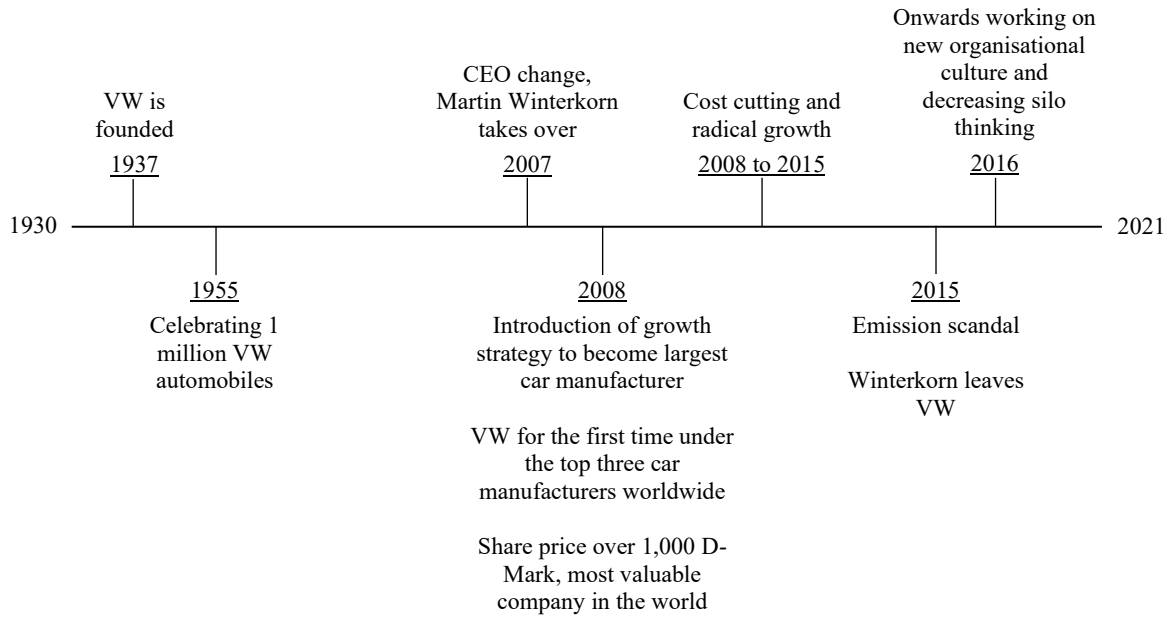
This section provides a detailed understanding of VW's history and organisation complementing Chapter 4. VW was founded in 1937 (Volkswagen, 2023). The VW Group comprises 12 brands and has a reputation for reliable, high-quality engineering. From its early days, VW envisioned a brand that would not only produce reliable, high-quality vehicles, but also dominate the automotive industry on a global scale. This vision materialised over time, with VW eventually becoming the largest car manufacturer in the world. In 2008, the CEO of the VW Group introduced the ambitious "Strategy 2018," a transformative plan aimed at solidifying VW's position as the undisputed leader in the automotive market (Volkswagen, 2009). This strategy placed a significant emphasis on growth and cost-cutting measures, exerting substantial pressure on managers and employees alike. This strategy worked out surprisingly well and VW grew extensively until in 2015 the organisation drew worldwide attention by admitting the use of software that resulted in fake emissions test results of more than 11 million cars worldwide.

The resulting scandal constituted the biggest crisis in VW history and led to a turning point in its strategy as it pivoted from aggressive growth to cutting jobs worldwide and focusing on sustainable growth. A timeline showcasing crucial moments in history for VW can be found in Figure 2.1 The leadership change at VW, catalysed by the emissions scandal, marked a pivotal moment in the company's trajectory. VW shifted from an organisational design focused on growth and cost-cutting to a more collaborative organisational design that increased communication and encouraged flatter hierarchies.

Organisational design played a critical role, especially in the wake of the emissions scandal and the subsequent leadership change. It became important for VW to restructure its organisational design to align with its renewed focus on sustainable growth and ethical practices. A fundamental shift in priorities took place. The scandal prompted a revaluation of VWs values and outcomes. The new emphasis on sustainability and responsible corporate behaviour

necessitated a reconfiguration of roles, responsibilities, and reporting structures within the organisation. This realignment ensured that every aspect of the company's operations reflected the new commitment to a more collaborative environment.

Figure 2.1. Timeline VW



The organisational design is needed to facilitate accountability and transparency. By establishing clear lines of responsibility and accountability, VW was able to rebuild trust with stakeholders. This was essential in order to regain credibility after the scandal. Transparency in decision-making processes and communication channels became paramount, enabling the company to demonstrate its commitment to ethical practices and compliance with industry regulations.

Furthermore, organisational design supported innovation and adaptability. To transition towards sustainable practices, VW needed to foster a culture of innovation and agility. This required creating cross-functional teams and fostering collaboration between departments. By breaking down silo thinking and encouraging knowledge-sharing, the company was better positioned to drive technological advancements and develop greener solutions. The VW case highlights the ways in which organisational design can actively divide departments and individuals and reinforce competition resulting in division between departments. As I investigated, it became apparent that the organisational design of VW played a significant role in the emergence of the scandal as well as in overcoming it.

Edinburgh Festival

This section provides a detailed understanding of the history of Edinburgh's festivals and the emergence of the Edinburgh Festival Organisation which features in Chapter 5 and Chapter 6.

History

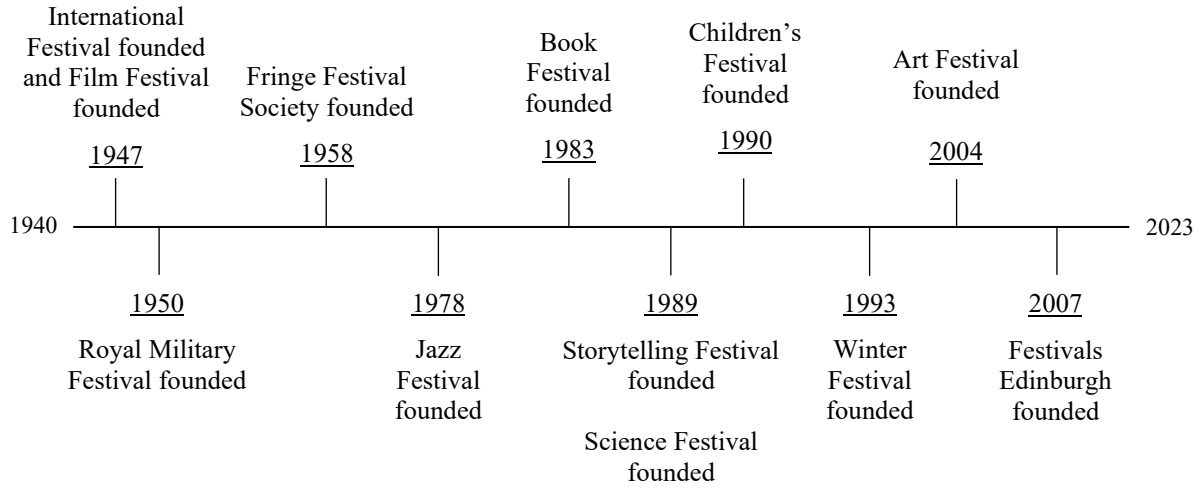
The history of Edinburgh as a city of festivals can be traced back to 1947 (Festivals Edinburgh, 2023). Following the end of the Second World War, the Lord Provost of the City of Edinburgh saw the benefits of a festival in his city and decided to develop a classical music festival that quickly became established as the International Festival. The International Festival was soon followed by the Royal Military Tattoo which commemorated the work and losses of the British forces in the Second World War. Both festivals were formally organised, had high social status, were heavily supported and funded by the City Council, and utilised prestigious venues such as the esplanade in front of the castle, Usher Hall and the Playhouse. The festivals were heavily funded and supported by the British Arts Council as well as the Edinburgh City Council. Venues were booked to host prestigious orchestras and present Edinburgh to the world as a cultural city.

Another festival appeared that, in contrast to the International Festival and the Military Tattoo, had to fight for status and acceptance, the Film Festival. Film was often not seen as an art form, but as a commercial product. Its lower status resulted in difficulties for the Film Festival to gather access to its preferred venues. In addition to the Film Festival, a small group of uninvited theatre groups began to put on their own shows in Edinburgh at the same time as the other festivals. They performed on the streets and in church halls, and slept in hostels and council housing. In 1948, a journalist named these groups "the fringes" because they were operating on the fringe of the International Festival. This festival has subsequently developed to be the largest "Fringe Festival" in the world.

Over subsequent decades other festivals emerged: the Jazz Festival in 1978, the Book Festival in 1983, the Science Festival in 1989 and the Storytelling Festival in 1989, the Children's Festival in 1990; in 1993 the Winter Festival and in 2004 the Art Festival emerged (Festivals Edinburgh, 2023). Figure 2.2 provides a timeline showcasing when each festival was founded. The density of eleven different high-profile festivals led to Edinburgh becoming a hotspot for

the creative arts. Edinburgh, as a small city needed to find ways to manage the festivals as well as to cope with visitors and space issues around their outcomes.

Figure 2.2. Timeline Emergence of the Edinburgh Festivals



Over the years some of the festivals like the Fringe Festival grew from very small origins to massive productions. The main reason for the growth of the Fringe was the increasing popularity of comedy. Successful comedians won prizes like the Perrier Award for the funniest act of the Fringe. This brought them money, publicity, an agent, and often their own TV shows. However, the growing popularity and size of various festivals eventually gave rise to tensions between them. As the festivals expanded, they began competing for funding, venues, and space, particularly the fringe was in direct competition with the International Festival. This led to disputes over scheduling, eventually prompting some festivals to spread out over the course of the year. Ultimately, many festivals opted to align their schedules, converging during the festival month of August.

As a result, the festivals and the City of Edinburgh felt that they needed to think about a long-term solution that would help them to perform well instead of outperforming each other through severe competition within Edinburgh. They developed an organisation called 'Festivals Edinburgh', whose organisational design has brought the 11 festivals and their stakeholders closely together. The unique organisational design of the organisation has drawn attention from international delegations from the Olympic Games organisers for 2028 in Los Angeles as well as government officials from different countries.

The Organisational Design of the Edinburgh Festival

The organisational design of the Edinburgh Festival consists of a Governance Board, a Committee of Festival Directors, Working Groups, and the individual organisation of the eleven

constituent festivals. This section is used to describe the tasks and layout of each of these bodies and lay the foundation for further discussion of this organisation in Chapter 5 and Chapter 6.

The main organising body for the festivals is Festivals Edinburgh. Festivals Edinburgh is an organisation that focuses on bringing the overarching areas of interest from the festivals together; it is a strategic umbrella organisation. Festivals Edinburgh consists of nine staff members. These nine staff members form an independent Governance Board, whose members are not associated with any of the festivals but encourage the collaborative working between the festivals and moderate if tensions arise. The Governance Board keeps the big picture in mind for all strategic decisions.

The Committee of Festival Directors consists of the Director of Festivals Edinburgh and the Directors of the constituent, eleven festivals. Important to the organisation of the Edinburgh Festival is its governance structure, which was established based on recommendations of a strategy report that can be seen as the founding document of the organisation. The Committee meets regularly, holding meetings at least five times a year in the form of formal and additional informal meetings. In the meetings, the festivals discuss challenges, ideas, and the general position of their organisation. These conversations are helpful for the individual festivals to understand what is going on in the other festivals, but also to see the overall picture of the Edinburgh Festival. The meetings of the festivals are, with help of the Governance Board, organised in a temporal rhythm allowing the festivals to discuss urgent, operational matters over the summer months when most festivals are having their main event taking place and to reflect and learn over the winter months when most of the festivals prepare for the next year. During the meetings consensus is reached through an open discussion moderated by the director of Festivals Edinburgh and a chair – which is a rotating role that goes from one festival director to the next over a (usually) 3-year time period. Each festival has a veto right with decisions only made if everyone agrees with what is being said. The role of the chair has another function, as each festival director comes eventually in this role. The festival director can see how the perspective shifts from being a member and representing the interests of his or her own festival to representing all festivals and trying to build consensus for all.

All eleven festivals are also represented in so-called ‘Working Groups’. These groups allow employees and managers from the eleven festivals to meet other festival employees and to work on common challenges and opportunities. For example, all human resource (HR) employees meet regularly. Working Groups stay based on reoccurring topics but are also influenced by new issues. In the past, a very important example has been Brexit. A ‘Visa Working Group’

has investigated the possibility of visa waivers for artists. Another example is the sustainability-working group. Initiated by the Science Festival 15 years ago this topic is now important to all festivals and the work and expertise of this group is being drawn upon.

The eleven festivals that together constitute the Edinburgh Festival have been briefly introduced in the former section on the early history of the festivals. They are, with the exemption of the Winter Festival, charities, which means they have a management body as well as a board structure. They are permanent organisations with different sizes, and different numbers of permanent staff. Table 2.1 below lists the festivals and the numbers of permanent staff each festival has (status July 2023).

Table 2.1. Staff Numbers Edinburgh Festivals

Festival	Permanent Staff*
Art Festival	10
Book Festival	22
Children's Festival	12
Film Festival	20
Fringe Festival	39
Winter Festival	1
International Festival	61
Jazz Festival	4
Military Tattoo	38
Science Festival	7
Storytelling Festival	7

*Information disclosed in interviews and annual reports

In addition, while all festivals get some support from the city council and other cultural funding bodies the support differs between a few hundred pounds to millions of pounds. Some funding is long-term focused based on collaboration between the festivals while other funding is competitive between the individual festivals.

Conclusion

In summary, a boundary work lens helps me to understand in detail the differences in organisational structures as well as the work being carried out by individual actors to encourage incremental as well as significant changes to the organisations design and as such influence their performance. The contrast between the large German automotive company Volkswagen

and the globally renowned Edinburgh Festival has provided interesting insides to organisational design across diverse industries. The process of combining findings from both settings contributes to a more holistic understanding of the mechanisms inherent in organisational dynamics.

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CHAPTER 3 - METHODS

This Chapter outlines the process that led to the application of the boundary work lens in my thesis and supplements my research methods sections from Chapter 4, Chapter 5 and Chapter 6. I focus on my personal understanding of theorising and provide more details about the methods employed. To study the organisational design and its implications on different organisational settings I applied qualitative research methods. I drew on different data sources for Chapter 4, Chapter 5 and Chapter 6. Chapter 4 is based on a personal account[1] and newspaper articles. Chapter 5 and Chapter 6 are based on interviews, archival documents, and strategy reports. For this thesis, except for Chapter 4, ChatGPT was used for proofreading this thesis, with the exception of Chapter 4.

Reflections of Adopting a Boundary Work Perspective

Coming from an industry background I wanted to develop a foundational understanding of what theory means as well as reflect on my own understanding of the world during the PhD. I started my PhD with readings on institutional theory as well as more broadly on organisational theory. Through these readings I explored many different theoretical lenses, I started off with a social movement perspective on organisations, I later explored place and inequality theories before ultimately establishing boundary work as the foundational theory of my thesis. This Chapter explains my relation to this theoretical perspective and how I aim to develop my theoretical thinking from here.

I started working in my first corporate job in 2013. Coming out of school I found myself in a highly structured and hierarchical organisation which led to my perception and interest in organisational design. I started to read about the three main categories (competitive, collaborative, configurational) of boundary work (Langley et al., 2019) and the purposeful role that actors, departments or organisations overall take in engaging with these categories of boundary work (Lawrence & Phillips, 2019). I found myself intrigued to explore observations of the past and present through a boundary work lens. My worldview feels closely aligned with the boundary work literature. As a result, Chapter 4 describes my transition period from an industry perspective to a theory-building understanding. Building on my learnings from writing Chapter 4, in Chapter 5 and Chapter 6 I explore a different organisational setting, which I was not familiar with before starting my PhD.

[1] As a result of conducting autoethnographic research, I have developed a personal account. This personal account serves as a document consisting of experiences, emotions, and interpretations from my time at Volkswagen.

Epistemology

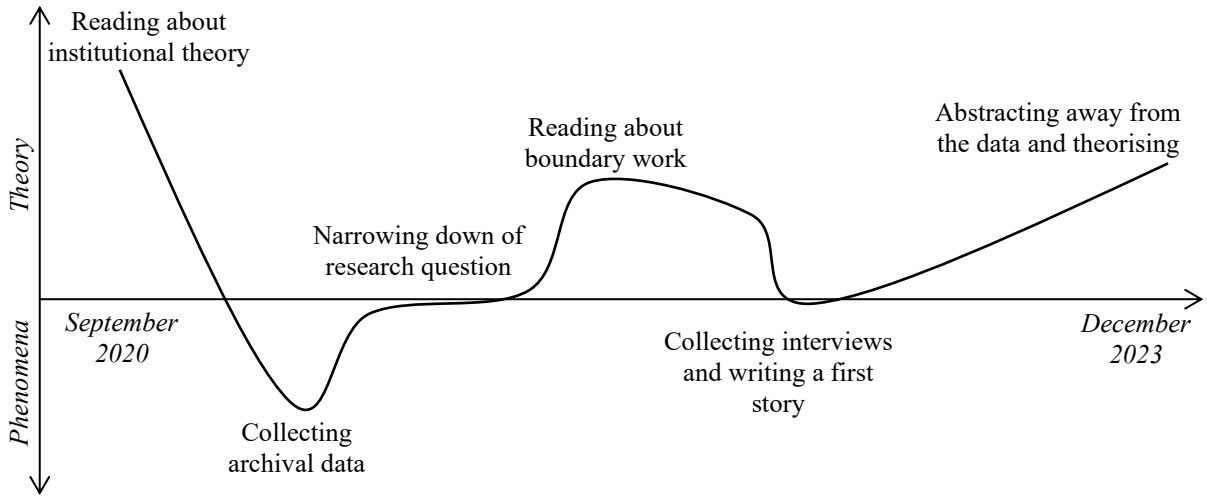
I follow an interpretivist epistemology in my studies (Blagoev & Costas, 2022). In my thesis, I attempt to gain a deeper, emerging insight into a topic of interest that goes beyond the surface while staying open to the unexpected. I aim to keep open to different aspects of an issue that I study and to my changing understanding and behaviour as a researcher over the past three years. I understand myself as a social actor who influences and interprets my research in specific ways. How I see the world is not necessarily how others see the world.

During my PhD my understanding from my position as a researcher shifted. During the analysis of annual reports for Chapter 4 and during the first archival data collection of Chapter 5 and Chapter 6 I understood myself as a distant observer. During my main data collection phases I felt immersed in the context. There were moments when I did not have any reflective distance (Louis & Bartunek, 1992). This closeness to my research object and the interviewees was very difficult. I could not see what should be part of my story and what might be additional insights that might be relevant for a different story and eventually a different paper. I struggled to be able to dive into my data as well as to zoom out and view my phenomena in a more abstract way. This learning process is still taking place but I have developed some methods to distance myself from the data.

While I struggled with zooming in and out of my data my institutional visit took place. The conversations with different academics and the discussions in courses helped me to see that every one of them had their own strategy as well as relationship to their data sets and their writing stages. I realised that while I am learning the craft of research, it is important for me to gain a distance to a phenomenon to be able to abstract away from it.

In addition, I understood that writing down the story without thinking about the full paper helps me to clear my thoughts and develop a logical structure. In Figure 3.1, I have visualised the fluctuations between phenomenon and abstraction in my thesis. This visualisation captures the alternation between more theoretical stages, where I dedicated time to reading and understanding the phenomena from a theoretical perspective. It also highlights stages where I delved into my data, closely working with the phenomena, and feeling fully emerged in my research setting. I observed myself defending the organisations I studied and experiencing a close connection to their work. I began to understand the organisations I researched based on the practices, values, norms, and understandings that they have in common.

Figure 3.1. Illustration of my PhD Journey driven between Theory and Phenomena



To gain a deeper insight into the phenomena I studied I reflected on my role as researcher during the two and a half years of data collection. I asked myself: How does my questions about organisational design affect the organisations? How do I influence these organisations? How do organisations act and interact? What is taken for granted and why? How do power and politics operate? Based on these questions I understand myself as a co-constituent defining the boundaries of the organisations that I researched through my own understanding of the organisations. As such, I selected, narrowed, defined, amended, and refocused the main interest of my research. To provide a brief example, I started my research of the festivals with a focus on one specific festival: the Edinburgh Fringe Festival. Later, through conversations and an extended understanding of my research objectives, I decided to focus on its umbrella organisation Festivals Edinburgh and the constituent 11 festivals, which come together under the umbrella of Festivals Edinburgh. My boundary around my research object had significantly changed in size.

Part of developing the boundaries of my research object was also related to negotiating the boundaries between the organisation and me as the researcher. I needed to reflect on what I can give back to the organisations I study. For Chapter 4, I shared my work with practitioners at Volkswagen and I am currently in exchange with different network groups (Women Career Network, Community of Potentials, DENK.bar and die kleine Scrum Schule) at Volkswagen that enhance the dialogue between external and internal members of the organisation. In these networks, I can present the findings of Chapter 4 and create a dialogue with practitioners around aspects of the case that are particularly interesting and helpful for them and their daily work.

For Chapter 5 and Chapter 6 it took longer to develop trust between myself and my research object as I was perceived as a total outsider to the organisation. The boundaries about what I had access to and whom I could talk to expanded slowly. I started by talking to peers about my archival findings and interests and developed a network to gain access to a gatekeeper that helped me to get in touch with the first seven interviewees. I prepared information, which the gatekeeper read to see if any changes in terminology might be helpful for the interviewees to understand my research interest.

It became clear to me that I needed to learn and use the language of the field to communicate with interviewees (Liubertė & Feuls, 2022). Informal conversations with the gatekeeper and my interviewees were important to understand their vocabulary and the meaning of terms for interviewees (Dordah & Horsbøl, 2021). For example, for many of the organisations the term *competition* was negatively connotated, not because they did not compete with each other but because they wanted to distinguish themselves as art organisations from corporates. The festivals did so by using a language and behaviour which differed from corporations. As such, they wanted to emphasise where they collaborated and highlight their family-like atmosphere based on formal and informal relationships between the individual festivals.

Then the gatekeeper reached out to the first seven interviewees and introduced me to them. I shared a short research proposal, a consent form to develop trust between the interviewee and myself for recording interviews, and a brief summary of my career and link to my university profile. I used interviews with the people in the organisations as an opportunity to construct meaning with the interviewee (Czarniawska, 2014). Over the next two years, I kept a close relationship with the interviewees including updating key informants on the research progress, establishing trust through sharing interview transcripts with them, and talking to key informants two or three times. This led to a shared meaning developed with the interviewees.

My language moved from the language of my research field to “my” field, my academic lens of how I understood and described the phenomena I overserved. This was an important learning step for me. I needed to explain in lay terms to the organisations I worked with why and how I made sense of the data I collected. It is important for me to summarise the lay findings of Chapter 5 and Chapter 6 to provide my insights to my participants.

Ontology

I identify myself with a constructivist ontology (Neesham, Reihlen, & Schoeneborn, 2022). I recognise that reality is not an objective, fixed entity, but rather a malleable and socially

constructed concept. This perspective asserts that knowledge and meaning are shaped through human interactions, interpretations, and collective experiences. I understand society and its organisations to be constructed by individual actors and groups through interactions (Berger & Luckmann, 1966). A constructivist ontology underscores the importance of narratives and practices as a powerful tool for sense-making and knowledge creation. I believe that stories serve as conduits for understanding complex phenomena. I wrote down my understanding of these constructions for Chapter 4, Chapter 5 and Chapter 6 in individual stories. To organise my thoughts and reflections I paid attention to what I saw, observed, and felt. These stories developed over time and while I immersed myself in the data questions about what is going on, what strikes me, what is accomplished, and what am I hearing, evolved. Based on these questions I am constructing knowledge by writing. My writing is based on what I have seen, how I have interpreted situations, conversations, and developments of the organisations I am researching. It is important for me that I do not only focus on what people say.

This ontological stance guides my approach to data collection and analysis. I immerse myself in the lived experiences of individuals and groups within the organisations I study. Through reflections of my own experience in an organisation, my observations as well as semi-structured interviews, I seek to discover the underlying narratives that shape the perceptions and actions of organisations and their subunits. This process allows me to uncover the subtle nuances and intricate threads that contribute to the ongoing construction of organisational realities.

My constructivist ontology emphasises reflexivity as a crucial element in the research process. I acknowledge that my own perspective and positionality play a significant role in shaping the narratives I construct. Therefore, I engage in continuous self-reflection to recognise and critically examine the biases, assumptions, and preconceptions that may influence my interpretations. This self-awareness ensures that my narratives remain grounded in a genuine attempt to capture the diverse perspectives and experiences of those involved in the organisational context.

Learnings

First, my approach to writing a research audit log has changed over my PhD. While I aimed to be as objective as possible when writing down my observations and thoughts, I became much more focused on my own emotional response later and started to address questions such as how I am feeling in a certain interview with certain people, and how their performances made me feel while I joined a play or concert. I learned that I need to reflect on my feelings and that they influence my follow-up questions as well as my general behaviour to the interviewee. As I adopt

an interpretivist epistemology and need to show how my data set and analysis developed, this is very important to me. Second, I did not heavily engage with emotions and feelings deriving from my field notes for Chapter 5 and Chapter 6 as this is not the focus of the studies. However, future studies could be designed focusing on this part of my data collection. In this thesis, I have explored how organisational design can influence outcomes in organisations in various ways. Moving to my faculty position, I would like to understand the role of society in organisational design and its outcomes. While it was not relevant to the papers developed during my PhD, I believe that emotions are important to understand the connection between society and organisations in my next research projects. Third, I want to explore the creation of artefacts to keep, organise and remember data that I have collected. Coming from an interpretivist perspective, artefacts can be crucial in remembering a very specific moment that I want to craft into a vignette to take the reader with me and gain further transparency in my research process, when I show a specific situation in my findings. Finally, I will keep a folder for ideas emerging from my data to look at during a later stage of my project.

Ethical Considerations

I faced different ethical challenges at each research site. Both empirical settings were explored from a qualitative perspective however my biases differed along with the approaches to data collection and my own reflections.

I did not work at VW with the intent to collect data. However, through my reflection on reports that I had to submit through my apprenticeship and through my personal diary, I gained important material for my autoethnograpy. It was important to me to make sure that I developed a robust framework of ethical considerations. This started with anonymising any individuals whose behaviour I describe in my diary and notes. I made sure that I was mainly talking about my own perspective on what happened and how I felt, emphasising that the personal account is just one perspective among many. I believe this transparency is crucial. In addition, I shared my personal account with former colleagues of mine at VW to gain their perspectives on events I described. Self-reflection and reflexivity were paramount. I had to acknowledge the role of myself as the researcher in shaping the narrative and scrutinising potential biases.

In contrast to Chapter 4, in Chapter 5 and Chapter 6, I engaged with the Edinburgh Festivals with the explicit intention of data collection. This meant that I thought from the beginning about ways of giving back to my interviewees as they spent a considerable amount of time talking to me in interviews, sending me documents, answering additional questions via e-mail, and even meeting me for coffee. I decided that I wanted to keep them up-to-date with my research

developments and share key insights with them on a continuous basis. It was imperative for me to establish a comprehensive ethical framework. This initiative commenced with the careful anonymisation of any individuals whose conduct features in my findings section. I took great care to present my own perspective on events and emotions, underscoring that this account offers just one viewpoint amidst many. I firmly believe that this transparency is essential. Furthermore, I shared versions of the findings with interviewees from the Edinburgh festivals. This collaborative effort served a twofold purpose: to ensure the preservation of anonymity and to incorporate their viewpoints and insights on the recounted events. Throughout this process, self-reflection and reflexivity were of paramount importance.

Data Collection for Chapter 4

To elaborate in more detail on my data collection and analysis I am including sections on this process in this methods chapter. I aim to provide additional insides and transparency of my research that I would not include in a paper submission to a journal. Data for this case study come from three main sources. First, autoethnographic data collected in the form of a reflective account (Hughes & Pennington, 2017) described my experiences as an employee at the VW headquarters over 5½ years from 2013 to 2018, a period that covered the emissions scandal being exposed and VW's response. My autoethnography consisted of the reports I had to submit weekly during my apprenticeship and my personal notes.

Autoethnography is a form of qualitative research method in which the researcher uses their personal experiences and reflections to understand a cultural or social phenomenon (Ellis, Adams & Bochner, 2011). Based on the autoethnographic method, I created a personal account. I used my diaries, documents, and memory as archives (cf. Wadhwani, Suddaby, Mordhost & Popp, 2018) to create the personal account. By utilising the past, I explore how my personal experiences are intertwined with a broader cultural context. Applying an autoethnographic method, I as the researcher am both, the subject and the researcher. I reflect on my own experiences, emotions, and interpretations, and how these are influenced by cultural, social, and historical factors. Data from the personal account come from the researcher's own experiences, often in the form of personal narratives, journals, reflections, and other autobiographical materials.

I was a complete participant (Gold, 1958) and had access to the VW logistics department in 2013 for a two-week placement, before joining VW group fleet development in February 2014 for four weeks. In summer 2014 I worked at the car part naming department for 8 weeks before

being placed in the site planning department of the VW headquarters in Wolfsburg from January to April 2015. From May 2015 to December 2015, I worked in the group communications department followed by working in the HR marketing department from January 2016 to September 2018 where I was responsible for the university marketing. Training during this time included an apprenticeship to become an industrial management assistant and preparing and conducting job interviews based on the VW recruitment strategy and rules. Informal socialising took place when presenting VW at career fairs in Europe and during after-work events with classmates of the apprenticeship programme and later colleagues from various departments.

The construction of the personal account followed an iterative process (Ellis, Adams, & Bochner, 2011). I started to write down brief text passages about each year of my employment that I based on my memory as well as personal diaries and calendar entries made during the time of employment. This first draft was then discussed with my first supervisor and extended on feedback loops. In each of the conversations with my first supervisor, the content of the personal account was discussed and key aspects that seemed to be interesting were elaborated in more detail until the document grew from a three-page document to a twelve-page diary.

The personal account shows in detail my personal reflection of my experience at VW during this time. This includes experiences in the two years leading up to Dieselgate, the breaking of the scandal in 2015, and the cultural shift of the organisation after the emission scandal beginning in 2016/2017. I was part of the "HR-Barcamp" at VW from April to September 2018, an initiative to use Design Thinking to develop a new HR approach between employees, top managers, and board members at VW. Figure 3.2 shows the initial diaries as well at the described iterative process of developing the final personal account.

Second, I drew on documents, including VW's Annual Reports (ARs) from 2008 to 2020, press statements and, website materials, relating to the scandal. As a publicly listed company, VW is notable for its detailed documentation and careful preparation of reports and statistics. The year 2008 marks the introduction of the VW "Mach 18" strategy, a ten-year strategy intended to make VW the leading car maker in the world by 2018. Therefore, given the significance of the year 2008 for VW my research commenced from that point onwards. The ARs from 2015 and 2016 describe the change process of the organisation while the reports from 2017 to 2020 show the implementation of the change processes at the organisation. Each of these annual reports covered on average 359 pages. In each annual report, my focus was specifically on the letter to shareholders, introductions of the CEOs, reports on expected developments and strategy explanations.

Third, media data were analysed. Media data can bring with them potential biases, political agendas, and hidden issues, which is why I have read them in combination with the ARs as well as the personal account. This allowed me to triangulate between three different data sources (Lincoln & Guba, 1985). The media footage was based on articles of the four biggest German newspapers (*Bild*, *Süddeutsche Zeitung*, *Frankfurter Allgemeine Zeitung* and *Handelsblatt*) as well as the British newspapers *The Guardian* and *The Times* covering the happening of the scandal and the first 5 years of the organisation's response from September 2015 to September 2020 co. I included multiple data sources to ensure that different viewpoints were part of the analysis. The six newspapers together allowed a balanced and quality approach to newspaper articles focusing on the emissions scandal at VW. The TV documentaries "Dirty Money" and "Dieselgate Die Machenschaften der Deutschen Automobilindustrie" were analysed to develop additional insights. To find relevant newspaper articles I used the databases Factiva and Nexis Uni. I included articles published between 2015 and 2021 that were focused on VW and the emission scandal. I used Excel to test different word combinations for each database. The search terms "VW OR Volkswagen OR Winterkorn OR VW-) AND (Diesel-Skandal OR Dieselskandal OR Abgas Skandal OR Abgasskandal OR Abgas-Skandal OR Abgas-Werte OR Abgas Werte OR Abgaswerte OR Abgas Manipulation OR Abgas-Manipulation OR Abgasmanipulation OR Dieselgate OR Emission scandal" were used.

However, not all relevant articles were available on Factiva and Nexis Uni. Therefore, I also accessed the newspaper archives directly. For example, the biggest German newspaper *Bild* brought up over 10,000 articles about the emission scandal in their online archive that I could not access through the databases. This could be the case because the database search is based on keywords and not on the basis of full-text search. Therefore, the original approach was changed, and I also manually searched for articles. I searched for "Volkswagen Emission Scandal/Volkswagen Dieselgate". Based on these results all articles relating to the scandal in relation to the organisational culture, the organisational design, potential root causes and the change after the emission scandal were analysed in Excel. I chronologically ordered them and highlighted 84 articles providing insights into the learning process of board members and change processes in the organisation.

Data Analysis for Chapter 4

The analysis of the personal account, the ARs and the newspaper articles allowed me to study the changes taking place in the organisation over time (Braun & Clarke, 2013). As this was my first research project, I decided to code the material by hand and with an Excel table to make

sense of the data without using Computer-assisted Qualitative Data Analysis Software (CADQAS) (Maher, Hadfield, Hutchings & De Eyto, 2018). It was important for me to read the data, highlight important incidents and develop a timeline that would inform my knowledge of the case step-by-step. However, to not get lost in the vast amount of data I understood that I needed to think about the links across the raw data, first-order categories, and subsequent stages of analysis.

Stage 1

I followed a theory-building process moving between the personal account, the ARs from 2008 to 2020 and the media footage collected. As a personal account is both process and product, it was important for me to describe my data analysis based on the personal account followed by a constructive (Feldman, 2003) and evaluative (Richardson, 2000) approach to develop confidence in the robustness of the data and the analysis. A challenge with a personal account is drawing a conclusion from the personal observations of the main author to develop a plausible and credible theoretical claim. The personal account was read by the first supervisor and key phrases were highlighted. The highlighted key phrases were then discussed in meetings between me and my first supervisor to gain more detail about these interesting key themes and create a new and plausible connection between the formal data from the AR, the theory of organisational wrongdoing, the organisational culture. Figure 3.2 provides an example of the emergence of the personal account.

Figure 3.2. Development Process of the Personal-Account

1st draft personal account	2nd draft personal account	3rd draft personal account and detailed key elements highlighted by the second author	4th draft personal account
… "Stimmungs-barometer" a traffic light tool that should show how well employees felt in the organisation from how they worked with their line manager to how capable they viewed themselves to do their job. It was invented a few years ago and depending on where you worked there was a great emphasis put on the results. We got guided in answering the tool in a certain way and I made a comment about this in front of my classmates. The feedback I got back was "I should not bite the hand that was feeding me" although I argued that I am hired to think critically and not just float with the current…	… "Stimmungs-barometer" a traffic light tool that should show how well employees felt in the organisation from how they worked with their line manager to how capable they viewed themselves to do their job. It was invented a few years ago and depending on where you worked there was a great emphasis put on the results. We got guided in answering the tool in a certain way and I made a comment about this in front of my classmates. The feedback I got back was "I should not bite the hand that was feeding me" although I argued that I am hired to think critically and not just float with the current…	… "Stimmungs-barometer" a traffic light tool that should show how well employees felt in the organisation from how they worked with their line manager to how capable they viewed themselves to do their job. It was invented a few years ago and depending on where you worked there was a great emphasis put on the results. We got guided in answering the tool in a certain way and I made a comment about this in front of my classmates. The feedback I got back was "I should not bite the hand that was feeding me" although I argued that I am hired to think critically and not just float with the current…	… "Stimmungs-barometer" a traffic light tool (dark green very positive, dark red very negative) that should show how well employees felt in the organisation from how they worked with their line manager to how capable they viewed themselves to do their job. It was invented in 2008. 540,000 employees worldwide take the anonymous survey each year. It aims to gauge the mood of employees (and after the implementation of the new strategy after Dieselgate it also aimed to gauge the start of the change process). The results of the tool are shared with the public in the annual report (AR). An example, so did the 2013 AR explain that employees can actively participate in the organisation's activity via the "Stimmungsbarometer". It was introduced as being used to talk about problems and raise difficulties. In 2014 the main message of the "Stimmungsbarometer" was employees would like to be more appreciated. However, the interaction of employees with the tool varied depending on the manager and their managers in giving importance to the tool. I understood the tool at this point as something that was a bureaucratic instrument that needed to be done as my manager would get questioned if we did not participate. Employees would not appreciate that they had the chance to engage, and it was common to click on a green dot so that no questions or problems where coming back to us. Otherwise, we as a team would have to solve the reported issues in additional working hours. Depending on where I worked, there was either great emphasis put on the results, or they got ignored. My first introduction to the tool was not a positive one. We got guided in answering the tool in a certain way: We were all sitting in a room in the Volkswagen Academy with computers in front of us. We would get the questions explained but also got explained that if we press orange (slightly negative) or red (negative) fields, questions would be raised and additional work might be needed. I made a comment about this in front of my classmates as we were all sitting in the same room when the employees of the Volkswagen Academy left the room to give us space to fill out the questionnaire. I did not like that my answers were guided as I wanted to be honest and did not see the sense in a tool that I would not use honestly. The feedback I got back was "I should not bite the hand that was feeding me" although I argued that I am hired to think critically and not just float with the current. Criticism of activities was not positively viewed and employees liked to stop others from remarking negative comments by telling them…

Stage 2

The iterative process (Langley, 1999) allowed different viewpoints to enter the discussion and allowed for an outsider's view of my understanding. The personal account was read again by the first supervisor. He highlighted additional key phrases that resulted in additional reflections on my side. Through this process, more detail was added to the personal account. At a later stage, this cycle allowed me to identify and order the data segments.

To establish the main themes, I built on the events that emerged as significant to the development of Dieselgate that were associated with strong structural and cultural elements of the organisation. They were interpreted as a key to the organisational wrongdoing that took place. Following an interpretive research tradition, I went back and forth between the data, the literature and the emerging structure of theoretical themes and theoretical implications by reading and rereading the material (de Rond & Lok, 2016; Ketokivi, 2013; Miles & Huberman, 1994).

Stage 3

The autoethnographic approach provides rich detail (de Rond & Lok, 2016) that when allied with the documents that I analysed gave me confidence in my theoretical claims. With respect to impact, I followed Langley's (1999) process research description of developing new connections between the ethnographic experience, formal data, theory, and common sense. Therefore, I systematically compared the data against my understanding based on the personal account as well as existing theory. Based on my interpretivist understanding, I was aware of the subjectivity of my experience (cf. Mantere & Ketokivi, 2013) in particular, and my data analysis overall.

The data analysis helped me to see the different ways in which boundary work contributed to organisational wrongdoing in the corporation where I worked. Together with my first supervisor I theorised how a combination of a) socio-cognitive[2], b) horizontal, and c) vertical boundaries created an infrastructure of organisational design that allowed organisational wrongdoing, prevented it from being challenged, and ultimately normalised it in everyday activities. The boundaries that were established created visible inequalities in status, knowledge, and power, hindering critical questioning, obstruct processes, and created a

[2] Socio-cognitive boundaries refer to the intersection of individual cognitive processes and social factors influencing learning. Further details on p.61 of this thesis.

stagnant environment. In these conditions organisational wrongdoing could emerge, become established, and normalised.

Data Collection for Chapters 5 and 6

Chapter 5 and Chapter 6 of my thesis are drawn from a different empirical context, the Edinburgh festivals, which I did not know much about. My unfamiliarity with the context meant that a significant amount of my work went into understanding the organisations that I was researching. At the beginning of my research, I conducted archival research to understand the background of the festivals and the City of Edinburgh. While I started taking handwritten notes to develop a timeline of important events that happened, I also scanned important archival material such as City Council meeting minutes to analyse after visiting the archives.

Soon, I realised that the biggest challenge was not collecting archival material but to distinguish what material to collect and analyse and which material not to focus on. In addition, it was difficult to contextualise quotes that come from archival material in comparison to a quote from an interview. Together with colleagues, I co-organised a workshop event at the Business School that focused on archival research, and we discussed the question of referencing archival work as well as the question of how to generate context around archival quotes. The importance of developing a writing style that shows the findings and provides necessary background information for the reader became clearer to me.

In addition, I visited as many different festivals and shows as I could from 2019 to 2023. I took field notes based on what I observed about performers, audiences, atmosphere as well as my own feelings after visiting each show. These notes helped me to develop a better understanding of my research setting but have not been used yet as explicit data collection material for my thesis. I aim to continue the collection of these data and use them at a later point after my PhD.

I started to write brief stories about Edinburgh, the usage of its public spaces and the Fringe Festival. This helped me to make sense of the archival material and I decided to start the interviewing process. I developed an interview guide that focused on the City's history and the Fringe Festival. From my first interviews onwards, I realised that my categorisation of the Fringe was not correct. The Fringe is one specific festival during the summer month of August, but there is an organisation called 'the Fringe Society' which is a permanent organisation administratively supporting the festival. In addition, there are many other festivals taking place at the same time. I came across the term 'Festivals Edinburgh', an unusual organisational arrangement that the eleven festivals taking place in Edinburgh had created and I decided to

look into this in more depth. I amended my interview guide focussing on Festivals Edinburgh in addition to each of the eleven constituent festivals.

Talking to the eleven festivals, additional stakeholders and former festival directors and managers meant that I needed to find a way of structuring my material. I decided to develop character files for each person I talked to. In these files, I stored interview guides, additional strategic material they provided, newspaper articles, secondary interviews and any other material related to each individual. I organised them according to the festival with which they were aligned.

To get additional interviews, I followed the snowball sampling technique (cf. Browne, 2005) and, over the next months, talked to representatives of the 11 festivals involved in Festivals Edinburgh as well as the director of Festivals Edinburgh, stakeholders the city and other festivals that followed as I discovered- the Edinburgh model. I developed a very rich, but complicated data set that I found difficult to put into clear differentiated stories. I started to draw my findings and discuss them with peers and my supervisors. To spend an intense period on theorising from my data I did an institutional visit to University of Alberta in Canada for four weeks to work intensively on Chapter 5 with my second supervisor. During this time period I rewrote the finding section many times and also presented my work in a three-hour brown bag seminar session to peers and academics. This process helped me to sharpen the story of Chapter 5 and to go back to another round of interviews with very specific questions for my interviewees. At the same time, I started to discuss my finding story with interviewees for a robustness check, to make sure that I have made sense out of the data in a way that is aligned with how they see the world.

Data Analysis for Chapters 5 and 6

The data analysis for Chapter 5 and Chapter 6 mainly took place using NVivo. I started by carrying out a thematic analysis (Braun & Clarke, 2006) that involved two steps. I analysed the archival documents to develop a historic timeline including crucial points in the festivals and the city's histories as well as a first summary of the relationships among the organisations involved. This timeline allowed me to understand when the number of festivals increased suddenly and hence the festivals were confronted with many audience and space challenges that led to competition. Further, interviews were used to develop a more detailed understanding of the operational details and relationships that developed over time among stakeholders. Through the interviews I understood that while there was solely competition initially, later there was also

collaboration. I also found that the archival data became more infused with meaning as I carried out the interviews. Stages 1 to 3 are the foundation for Chapter 5 and Chapter 6; the later stages differ between Chapters.

Stage 1

In my abductive analysis, I travelled back and forth between data, literature, and emerging theory (Locke, 2001). In this process of gradual abstraction, I categorised the raw data, linked categories to themes, drew organisational structures, and aggregated the themes into a theoretical framework (Pratt, Rockmann, & Kaufmann, 2006). I began with open coding of text describing the Festival Organisation. What emerged as most interesting was the design of the organisation that was strongly connected to the more competitive past of the organisational members and the more collaborative subsequent relationship among them. In addition, the success that the Festival Organisation achieved with this design seemed unique and each festival appeared to be clearly distinguished from one another. When I conducted additional interviews, transcribed, and open-coded them more details emerged, for example, when and how the festivals moved from a more competitive approach to a collaborative one.

Stage 2

Consistent with the boundary work literature (Langley et al., 2019), I conceptualised the actions and practices of the festivals involved as 'competitive boundary work' and 'collaborative boundary work'. As I read my interviews, I was struck by the consistent responses of the Festival Directors about the Edinburgh Festival as a family of festivals that maintain their individual characteristics yet are still united as 'Edinburgh Festival'. I analysed the first 18 interviews again this time specifically searching for keywords and phrases about the sense of belonging and relationships among the festivals (e.g., family, speaking with one voice, together).

Stage 3

I went back to the literature to read about competitive and collaborative boundary work and decided to code all interviews specifically for this. As a result, I understood that boundary work changed over time influencing the design components of the organisation. At this point, I got interested in the connection between the emerging design of the organisation and the mission management of the organisation. For Chapter 5, I decided to focus on the organisational design of the Festival Organisation.

Stage 4 (Chapter 5)

To make sense out of what I heard I drew the Festival Organisation to discuss its structure and form with my supervisors and analyse how all three of us understood the organisation design of the Festival Organisation. This was a complicated process as we had to discuss and understand the key parts of the organisation design, needed to understand relationships among these key parts and needed to compare these key elements to already established organisational forms. I went back and forth between my findings and the literature reading about collaborative organisations from a boundary work perspective (Adler & Heckscher, 2018), matrix forms of organisation, meta-organisations (Ahrne & Brunsson, 2005), network organisations (Jones, 1996) and Mintzberg's "community ship" (Mintzberg, 2023). While I could see some connections with these organisational forms, they did not capture what in my view made the Festival Organisation unique. The importance of creating a creative tension between competition and collaboration, the understanding of the organisational members as family members that help each other without immediately wanting something in return, as well as the different sizes of the organisations involved and the different genres, they focussed on were not adequately explained in the literature.

Stage 5 (Chapter 5)

I decided to focus on Chapter 5 specifically on the design elements that comprised the Festival Organisation. I went back to my findings and asked myself how the design of the Festival Organisation developed. I understood that in addition to a need for sustained tension between competition and collaboration four key factors seemed to be crucial for the organisation to function well: a) acceptance by the City Council and government, b) trust among constituent members, c) flat hierarchies and d) formal and informal relationships. I then read all of my conducted interviews again and coded them for these four key factors.

Stage 4 (Chapter 6)

For Chapter 6 I decided to focus on the mission management in the Festival Organisation. I was already familiar with my data and the design of the organisation but I did not yet understand how the organisation managed to stay away from mission drift while having multiple contradicting missions at play due to the different festivals and their demands. I kept the boundary work lens as it seemed that this perspective could help me in analysing how the Festival Organisation managed its diverse missions.

I went back to the literature and read about the emergence of missions, mission management, and mission drift. I understood that we know quite a lot about how organisations overcome mission drift as well as what organisational designs can be useful in preventing subsequent mission drift. However, what the Festival Organisation showed in detail was how organisational design allowed the avoidance of mission drift from its foundation. I went back to the interviews and the strategy reports to read about the understanding of the Festival Organisation of what their missions were.

Stage 5 (Chapter 6)

I wrote down the missions for each of the festivals and drew how they aligned or misaligned over time. I then went back to the interviews and read them with a focus on moderating the interest of the constituent festivals, structuring the work within the organisation, and communicating between the constituent festivals. I wrote down the story of the findings section for the first time. I structured the findings by naming the missions of each festival, along with the configurational boundary work that took place. This did not adequately explain how the organisation functioned. It struck me that mission management seemed not only to take place through configurational boundary work, but that something else was taking place.

Stage 6

I went back to the boundary work literature and read about the different categories of boundary work. I realised that I had not yet coded my data set for temporal boundary work. While this did not seem important for Chapter 5 it seemed that the configured use of temporal boundaries through the Governance Board was important for the organisation to take multiple missions into account. Hence, I coded the interviews for examples of temporal boundary work. This seemed to be much closer to my data. I thus coded for temporal boundary work, temporal boundaries, and how time varies in its impact and use in organisations.

Conclusion

In conclusion, this Chapter elaborates on how my epistemological and ontological assumptions fit with the theoretical underpinnings of my work. As I understand the world as socially constructed it is important to me to explore how organisational design is enacted in organisations through a boundary work lens. I draw on interviews as well as ethnographic elements to understand how organisational design influences organisational members and ultimately the outcome of their organisations. As such, this Chapter establishes the foundation for subsequent chapters by highlighting the significance of my methods employed. It serves as

a crucial bridge between the conceptualisation of the boundary work lens and the application of my research methods in Chapter 4, Chapter 5 and Chapter 6. By drawing on diverse data sources, each corresponding to the unique characteristics of the organisational design examined in Chapter 4, Chapter 5 and Chapter 6, I have strived to capture the richness and complexity inherent in the phenomena under investigation.

In Chapter 4, the utilisation of a personal account and newspaper articles contributes to a multifaceted exploration of the organisational design within the context of Volkswagen. This approach not only offers personal insights but also integrates external perspectives, adding layers of depth to the analysis. Chapters 5 and 6, on the other hand, rely on interviews, archival documents, and strategy reports to delve into the organisational design of the Edinburgh Festival. This diverse array of data sources ensures a comprehensive examination of the festival's strategic decisions, historical context, and organisational evolution. As the subsequent chapters unfold, the detailed exploration of the empirical data collected will contribute to a nuanced and insightful analysis concerning the role of organisational design.

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CHAPTER 4 - ORGANISATIONAL WRONGDOING, BOUNDARY WORK, AND SYSTEMS OF EXCLUSION: THE CASE OF THE VOLKSWAGEN EMISSIONS SCANDAL (PAPER 1)

Abstract

The Volkswagen (VW) emissions scandal was one of the largest examples of organisational wrongdoing in corporate history, costing the firm immense damage to its reputation and over $33 billion in fines, penalties, financial settlements, and buyback costs. In this paper, we draw on the concept of boundary work to provide insight into the causes of wrongdoing at VW. Supplementing other work on the scandal, we show how the ways in which boundaries became established in the organisation resulted in an internal context that defined "in" and "out" groups, normalised certain behaviours, and limited communication across intraorganisational boundaries. This allowed wrongdoing to not only become established but also to go unchallenged. We provide contributions to broader understandings of organisational wrongdoing and to the temporal unfolding of boundary work by theorising how a combination of socio-cognitive, horizontal, and vertical boundaries can create an infrastructure of organisational design that permits organisational wrongdoing, prevents it being challenged, and ultimately normalises it in everyday activities.

Keywords

Wrongdoing, boundary work, socio-cognitive boundaries, organisational design, Volkswagen scandal, Dieselgate

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Introduction

Organisational wrongdoing is the (co-) organised behaviour engaged in by individuals, groups and organisation that violates laws, transgresses industry or professional codes, and/or results in the breach or neglect of social norms or ethical rules (Palmer & Moore, 2016). Scholars, investigative journalists, and organisational whistle blowers have highlighted the consequences for individuals, businesses, and society of organisational wrongdoing across a range of empirical settings. Much of this work has positioned wrongdoing as an abnormal event attributable to either a single person or very small number of individuals working together (e.g., Clemente & Gabbioneta, 2017; Effron et al., 2015; Gabbioneta et al., 2013; Kish-Gephart et al., 2010; Lavena, 2016; Schnatterly et al., 2018; Starbuck & Milliken, 1988; Van Rooij & Fine, 2018).

A second stream of research has viewed wrongdoing as a natural, even predictable, outcome of organisational arrangements (Balch & Armstrong, 2010; Dempsey, 2015; Fleming et al., 2020; Palmer & Moore, 2016; Rosa & Vaughan, 1997; Sims & Brinkmann, 2003). It is the latter perspective that we adopt here. In so doing, we align with Fleming et al. (2020) call for research into how wrongdoing becomes normalised and systematised in organisations.

Taking a position that wrongdoing can emerge as a consequence of organising forces us to move beyond individual motivations and uses of personal power bases to think more broadly about organisation designs that allow such activities to emerge and, crucially, often go undetected for long periods. While work has pointed to the importance of organisational design for our understanding of wrongdoing (e.g., Clemente & Gabbioneta, 2017; Gabbioneta et al., 2013; Gaim et al., 2021; Kish-Gephart et al., 2010; Palmer & Moore, 2016), insight into how it emerges and can become established remains nascent. Our work furthers understanding in this area through an examination of the "Dieselgate" scandal at VW, the largest car manufacturer in the world (Statista, 2021; The Economist, 2021). The wrongdoing that emerged following VW's admission in September 2015 to the use of software installed in cars – the so-called "defeat device" – to fake emission test results in over 11 million cars worldwide constituted one of the largest corporate scandals in history.

The purpose of our paper is to assess how organisational design through the purposeful creation and maintenance of internal organisational boundaries contributed to the malfeasance that took place at VW. Our work is founded on data from a rich a personal account supplemented by corporate documents and media coverage. In so doing, we seek to supplement other work on this scandal that has pointed to the ways in which organisational culture, power inequalities,

and hierarchical arrangements influenced the emergence of corruption at VW (see, for example, Cavico & Mujtaba, 2016; Clemente & Gabbioneta, 2017; Ewing, 2017; Gaim et al., 2021; Rhodes, 2016). We show how boundary work contributed to an internal context that defined "in" and "out" groups, normalised certain behaviours, and limited communication across intraorganisational boundaries. This allowed wrongdoing to not only become established but also to go unchallenged.

Theoretical Framework

As our understanding of organisational wrongdoing has developed, so it has become understood that power structures, administrative systems, and culture can lead not just to effective ways of working but also to negative outcomes (Palmer, 2013). Understanding how organisational structures can lead to malfeasance, however, remains nascent (Palmer & Moore, 2016).

Organisational Design and Wrongdoing

Structures in organisations are intended to provide organisational actors with formal and informal guidance regarding how to act. They enable organisations to function and provide an orientation for decision-making. Intrinsic to such arrangements are distributions of authority and power that help determine how employees should act, particularly when they are confronted with problems that they cannot solve (Palmer, 2013). Formal authority structures ensconced in hierarchical arrangements establish a chain of command allowing subordinates to pass key decisions to a more senior official. So far there is limited work on how such hierarchical arrangements influence the emergence of wrongdoing (Brahm et al., 2021; Langley et al., 2019; Lavena, 2016).

A further important feature of organisational designs is the ways in which work is divided among subunits. This necessitates the establishment of effective integrating and communication devices that allow information to flow effectively. The ways in which information is either shared or not shared will likely shape decision-making processes and subsequent courses of action (Palmer, 2013; see also Schnatterly et al., 2018). Furthermore, as individuals or groups accrue power, so they develop opportunities to contour organisation designs and information flows to suit their own interests. This can lead to tensions over appropriate courses of action, which, as Gaim et al. (2021) showed in their study of the VW Dieselgate scandal, can create a situation in which subunit objectives are "achieved" through impression management rather than substantive performance outcomes.

Work linking design arrangements to organisational wrongdoing has largely centred on two explanations. First, research that defines wrongdoing as an abnormal activity has largely built on rational choice theory with actors described as engaging in mindful and rational actions in the pursuit of some form of self-interest (e.g., Anand et al., 2004; den Nieuwenboer et al., 2017). The second perspective views wrongdoing as an inherently normalised phenomenon that emerges as an outcome of administrative systems, situational social influences, and power structures (e.g., Fleming et al., 2020; Palmer, 2012). Here, wrongdoers are not viewed as engaging in mindful and rational deliberation; rather, wrongdoing is linked to the social context in which they operate (Ashforth & Anand, 2003; Palmer, 2017; Palmer & Maher, 2006). We build on this emerging stream of work by drawing on the concept of boundary work to further understanding of how such organisational arrangements develop and their potential consequences.

Boundary Work

Boundary work constitutes "the purposeful, reflexive effort of individuals, collective actors, and networks of actors to shape a social boundary" (Lawrence & Phillips, 2019, p. 158). Boundary research has traditionally focused on studies of everyday work in order to reveal formally understood roles and jurisdictional boundaries that may be blurred or reinterpreted as they are enacted in situations where collaborators are dependent on each other to accomplish their task (e.g., Grieryn, 1983). Based on this understanding, boundary work has been seen as one of the key means to legitimise actions. As organisational boundaries become socially accepted, they can become institutionalised to the point that they are very difficult to change or erase (Zerubavel, 1993). As research into boundary work has evolved, so it has become understood that boundaries are often co-constructed outcomes of organisational insiders and outsiders (Bechky, 2012). Such work is intentional (Langley et al., 2019) and leads to the creation and/or legitimisation of particular practices. Thus conceived, boundary work has material effects on the distribution of power and privilege (Zietsma & Lawrence, 2010). It also determines whose interests matter.

Langley et al. (2019) described three categories of boundary work. Competitive boundary work involves mobilising boundaries to establish advantage over others. In configurational boundary work, individuals manipulate patterns of differentiation and integration among groups in ways that bring some activities together and keep others apart. Finally, collaborative boundary work describes the alignment of boundaries to enable collaboration among subunits. In each case, boundary work involves ongoing, situated activities that require social interactions and

practices among various actors over time (Gieryn, 1983, 1996). Thus, boundaries not only differentiate groups, but they also bring together individuals explicitly and implicitly (Berthod et al., 2021), often in the guise of organising for effective and efficient operation.

Building on the work outlined above, we consider boundary work as having the potential to offer novel insights into the ways in which organisational design can lead to 'normalised' wrongdoing. While we know that boundaries act to include and exclude particular actors, the links with organisational wrongdoing remain underexplored. Langley et al. (2019) and Berthod et al. (2021) are among those who have recently suggested that the boundary perspective constitutes a potentially useful lens for studying organisational wrongdoing by highlighting intangible elements of organisational design as well as emphasising the roles of those in boundary construction. Such work can also allow us insight into who is involved in decision-making, who is excluded, what is prioritised, and how associated activities can emerge and become established.

Methods

Data Collection

Data for this case study are drawn from three main sources (see Table 4.1). Following Hughes and Pennington (2017), the case principally rests on a personal account based on the first author's experiences and personal diaries kept while she worked Organisational Wrongdoing, Boundary Work, and Systems of Exclusion 175 at VW's headquarters between 2013 and 2018, a period that included the emissions scandal being exposed and VW's subsequent response. The first author worked initially as an apprentice while completing her undergraduate degree, gaining experience across six departments at the company's headquarters in Wolfsburg, Germany. From January 2017 until September 2018, she worked full-time as a manager in the Human Resource-Marketing Department. This resulted in her having regular interactions with people from across the entire headquarters. The personal account was constructed from personal diaries and calendars that documented the first author's daily activities, observations, moods, and opinions.

Our second source of data comprised documents, including VW's Annual Reports[3] (ARs) from 2008 to 2020; press statements; electronic documents on the company's website; and written accounts relating to the scandal. The year 2008 was chosen as the starting point as it marked

[3] The Annual Reports were produced in English; all German language documents were translated by the first author.

the introduction of the VW "Mach 18" strategy, a 10-year strategy intended to make VW the world's leading car manufacturer by 2018. Particularly useful were the ARs from 2015 and 2016 that described the impact of the scandal and the resulting planned changes, and the reports from 2017 to 2020 that documented the implementation of those processes.

Third, we collected an extensive array of media data. To mitigate the ideological biases that characterise newspapers in particular, we drew on the four biggest German newspapers (*Bild, Süddeutsche Zeitung, Frankfurter Allgemeine Zeitung and Handelsblatt*) and the British newspapers The Guardian and The Times from September 2015 to September 2020. The six newspapers collectively allowed a relatively balanced approach to coverage of the scandal. Two TV documentaries, one from Netflix titled "Dirty Money" and the other from Arte called "Dieselgate – Die Machenschaften der Deutschen Automobilindustrie" were also analysed to draw additional insights.

Data Analysis

In analysing the data, we followed a theory building process moving between the data and the literature. Table 4.1, Table 4.2 and Table 4.3 provide an overview of how we moved from the raw data to our emergent theoretical themes. A personal account is both process and product, it is important to describe our data analysis in detail following a constructive (Feldman, 2003) and evaluative (Richardson, 2000) approach to develop confidence in the robustness of the data and the analysis. In the first phase, the personal account was read by the co-author and emergent themes that seemed empirically and/or theoretically important were highlighted and discussed. This allowed further elaboration of the themes to create plausible connections between the data, theory, and common sense (Langley, 1999). This process was repeated two further times, allowing us to challenge, refine and develop our understanding of what happened, and why.

Table 4.1. Data Collection Sources

Data Source	Time Period	Use
Personal Account	2013-2018	Detailed insights into activities and behaviours at VW
Company documents (e.g., Annual Reports, strategy documents)	2008–2020	Understanding of official strategic intent and what was emphasised by VW leadership
Media Footage (newspaper articles and documentaries)	2015-2020	Analyses of VW, the car industry and the Dielselgate scandal

Table 4.2. Emergent Themes Pre-Scandal**.**

Data Segments	Emerging Themes	Overarching Themes
In the Company's headquarters in Wolfsburg, Professor Dr. Martin Winterkorn, Chairman of the Board, and Walter de Silva, Head of Group Design, discuss every single detail. Both are perfectionists. Sometimes they know what the other is thinking without speaking a single word…. The two men complement each other perfectly. [Winterkorn] is never satisfied: "There's always room for improvement." De Silva is of the same mold: "Many people equate creativity with complete freedom, but it is actually discipline that is the basic prerequisite for creativity." (AR, 2009, pp.16 & 19)	Homogeneous Thinking	Socio- Cognitive Boundaries
I remember my first day. I went to work by foot and could not find the right entrance. The Volkswagen site in Wolfsburg is like a city within a city and all gates are protected by security guards. I finally made it to the right gate and the guard told me where I had to go. In my first week I met the other 24 new employees that made it into a programme for which more than 3000 people applied. We knew that Volkswagen was a very good employer and that it had difficult entry requirements. We got congratulated for our achievement and learned about the organisation, its strategy, the production of Volkswagen cars and the legacy that came with it. The group of applicants that got accepted was very homogeneous. The women that told us we should better not think about dying our hair, having tattoos or piercings. (Personal Account)		
"Team work instead of silo thinking. Mr. Blessing, [the HR Board member in 2017] stated that Volkswagen will renew its culture throughout the Group after the emission scandal. He sees Volkswagen in need of a profound transformation process." (Menzel, 2017)		
"Our mission – the future. The route has been mapped out, the strategy finalised: Our aim is to make the Volkswagen Group the leading automaker by 2018." " (AR, 2010, p. 28).	Pursuit of Perfection	Socio- Cognitive Boundaries
"Prof. Dr. Martin Winterkorn, Volkswagen's Chairman of the Board of Management, is a perfectionist who knows the value of technological excellence" (AR, 2010, p. 28).		
A main interview in the 2010 AR with a senior manager has the title "precision and perfection". The word "perfection" is used six times in the interview. (AR, 2010)		
If mistakes took place employees would not always talk about them. The fear of being reprimanded for a mistake or being looked down upon by colleagues was always high. Successful managers were viewed as not making mistakes. Everyone knew stories of how senior managers would castigate front-line workers and middle managers if the quality of a car or car part was deemed inadequate. (Personal Account)		
Employees must believe in ambitious goals their company sets (AR, 2010).	Active Participation missing	Vertical/Horizontal Boundaries
Working in various departments was always based on the same pattern. Employees could be experts for their task but at the end the manager would decide what strategy to implement to recruit graduates, what color scheme to use or what to do in general. Hierarchy always outdid expertise. (Personal Account)		
In the old Volkswagen world, nothing took place without pressure from the top. (Busse, Hägler, Hulverscheidt, Janisch & Ott, 2017, 2017)		

The emissions scandal has recently turned the Volkswagen Group upside down. The nervousness can be felt at all levels of the 600,000-employee group - not just on the assembly line, where temporary workers fear for jobs and permanent workers for the future. The diesel manipulation has also left its mark on the highest floors – the board of directors, the presidium, supervisory board. The power relations that had been established over the years have fallen apart. Because the goals of the most important actors are not the same everywhere: While some fear for their dividends, others fear for jobs and entire plant locations (Dpa, 2016)	Creation of Rigid Hierarchies	Vertical Boundaries
Müller, the new CEO had his first working day. He gave 1200 managers the chance to talk to him and ask questions. Müller was purposeful, relaxed, and this openness transferred (after some initial hesitancy) to the other managers. Müller stated that the "we" would be important at VW now, not the voice of one individual. In comparison, when Winterkorn was in charge managers needed to draw cards for the right to ask questions during events with their CEO. This stopped managers from talking to one another (Bay & Dowideit, 2015)		
The treatment of senior managers became seen as exemplary practice lower down in the hierarchy. I remember the introduction of our new HR area manager, a position one level below the board of management. Our head of department asked us to send questions we wanted to ask the new area manager so that she could approve them before we went to a formal introductory meeting with her. No ad hoc questions were permitted (Personal Account).		
The core elements of 'Strategy 2018' included a targeted expansion of the brand and product portfolio and a further strengthening of the global presence. Translated into the daily work at VW this meant more brands, more models, more cars. The main thing was to gain more and more (Fromm, 2016).	Growth above Everything	Vertical/ Socio-Cognitive Boundaries

Table 4.3. Emergent Themes Post-Scandal

Data Segments	Emerging Themes	Overarching Themes
Realigning structures, mindsets, the way we approach things (Momentum magazine interview, 2015). After the new strategy 'Transform 2025+' was introduced to us everyone suddenly started to talk about the need to acknowledge failure. Some departments or data labs started to introduce so called "Fuck up nights" where prominent managers and board members would discuss their biggest failures. This was all motivated by encouraging employees to not be afraid to speak up if something went wrong (Personal Account).	Move from homogeneous thinking to heterogeneous thinking	Socio-Cognitive Boundaries
The new CEO talked about the realignment of structures (Momentum magazine interview, 2015). "The new human resources strategy is setting innovative trends. Hierarchies are being dismantled and modern forms of working such as agile working – an approach whereby most of the responsibility for the work organisation is transferred to the teams – are set to be expanded" (AR 2019, p.149). One of my main ideas was that I wanted to change the way VW appeared to potential applicants and the public. I suggested that we no longer wear suits at career fairs but jeans, sneakers, branded college varsity bomber jackets and white shirts. It took several presentations to convince my department head but I was allowed try it out at a small career fair. It became a big success. The branded college jacket got introduced for all main VW events. It was now apparent that senior managers were open to new ideas from lower level employees in a way that never happened before "Dieselgate". I was also given much more responsibility for projects on my own (Personal Account)	Flatten Hierarchies	Vertical Boundaries
Emphasis is put on managers and employees to "encourage, protect and value the reporting of concerns and suspected wrongdoings" (AR, 2019, p.63) Changing the VW culture was declared a priority. New values were introduced and promoted relentlessly. Being critical was supported. In the HR-Marketing department, I witnessed a big jump from a very conservative culture to one that was open and supportive (Personal Account).	Organisational Culture	Socio-Cognitive Boundaries
Rather than an emphasis on secrecy, collaboration across VW sites was encouraged. "The design of the production network enables us to respond dynamically to changes in demand at the sites. [We can] even out capacity utilisation between production facilities." (AR, 2019, p.174). When I started to do career events it was very much about not sharing all of my information with other departments and other VW brands. By 2018 this was very different. I was asked to reach out to other brands within the Volkswagen Group and we even had a shared calendar with other brands to see who would be at what event. The same happened at the department level, "sharing is caring" started to become a regular refrain, at least among most of the younger colleagues (Personal Account).	Horizontal Collaboration	Horizontal Boundaries

To establish the main themes, we built on the events that emerged as significant to the development of Dieselgate that were associated with design elements of the organisation. Following an interpretive research tradition, we went back and forth between the data, the literature and the emerging structure of theoretical themes and theoretical implications by reading and rereading the material (de Rond & Lok, 2016; Mantere & Ketokivi, 2013; Miles & Huberman, 1994).

Findings

Our findings below show the ways in which boundaries were actively created and reinforced resulting in vertical and horizontal divisions between groups across the organisation. Moreover, boundaries conditioned how people thought and acted, allowing value-impregnated norms to emerge and become established, and actions going unchallenged. The first author's observations and experiences, that were central to our emergent understanding of the antecedents of the scandal, are identified in the findings through the usage of examples described in the first person singular. We established the key themes that emerged in a chronological order looking at the organisation in the lead up to Dieselgate before focusing on how the organisation responded to the scandal. This post-scandal period was important as it revealed the conclusions of what VW's leadership felt caused Dieselgate and what it needed to do to overcome what was an existential crisis at the firm.

Pre-Scandal

Growth. From 2007, when Martin Winterkorn became CEO, the quest to become the world's biggest automaker was overtly expressed internally, in public pronouncements, and in VW's various strategy documents and annual reports. A letter to shareholders in 2011 started by declaring, "We clearly exceeded the ambitious goals that we had set ourselves for 2011." It then went on to detail records that had been broken and how much closer the organisation had come to attaining its goal:

> With vehicle deliveries of 8.3 million – over one million more than in the year before – we again substantially outperformed the overall market. Our sales revenue increased by 25.6 percent to €159.3 billion… a new record. (AR 2011, pp. 20–21)

The desire for continual growth was placed at the center of the firm's strategy resulting in an emphasis on recruiting only the best students and graduates and placing an expectation of high levels of employee performance in order to become the world's biggest automaker. The question of how sustainable this growth was and how this overarching goal would be interpreted

by managers and employees was not raised. On the contrary, the mantra of growth was explicitly communicated by leaders at all levels in the day-to-day running of the organisation. In VW's official communications, from 2008 onwards, the emphasis on growth was a persistent feature, exemplified by this quote from the Strategy 2018 document: "the goal is to increase unit sales to more than 10 million vehicles a year" (AR 2013, p. 49). In this environment, unsurprisingly, I that led to growth were lauded. Those were quickly internalised by new recruits, as the first author experienced. Importantly, with growth idealised and rewarded, competition between subunits rather than cooperation was normalised, something that served to harden internal boundaries. Thus, not only was their pressure to achieve high levels of growth within subunits, scrutiny across subunits was diminished, two conditions that raised the likelihood of wrongdoing taking place.

Pursuit of Perfection. Aligned with the constant striving for growth was a pronounced emphasis on the pursuit of perfection in all activities. Communication through the organisation extolled the virtues – and importance – of achieving engineering mastery, not about how difficult something was to create or how many attempts were required. Incentives were tied to the achievement of high levels of performance; problems along the way were expected to be (re)solved. The way in which this striving for extremely high levels of performance became embedded in the culture at VW was demonstrated when Winterkorn was asked to explain what the term "dedication" meant to him:

> I discovered early on that it is only possible to achieve great things with genuine dedication and passion. Dedication is first and foremost an attitude: it means giving your all, whether you are an athlete, a scientist, or an engineer. I have the utmost respect for people who show such dedication…People whose heart is not truly in their work tend to settle for less. Dedication makes people go the extra mile, encourages them to consider how to make things even better. Dedication is a relentless driving force, it's not an easy option–but it does leave you with a profound feeling of contentment. (AR 2012, p. 29)

This quote is highly illustrative in that it aligns the pursuit of "great things" with a dedication to VW; by contrast, those who are not dedicated will "settle for less" and are clearly not valued. The emphasis on dedication underpinned the demands for extraordinarily high levels of performance that became normalised across VW. Managers across the organisation frequently reiterated the importance of "perfection."

Looking at my own experience, for each semester I would hand in my marks achieved at the university to the Human Resource department so that my progress could be monitored. I, and my colleagues, felt pressure to perform at a very high level. It was also made clear to me that

excellence was not considered to be a team characteristic but rather was developed through the creation of individual performance goals. This was also developed by creating competition among different individuals and groups. A consequence of this was that communication between managers of different groups was kept at a minimum to not share potential sources of subunit advantage that were perceived as being advantageous to a manager's career prospects. The messages that I received, with the emphasis on individual performance, were aligned with this exhortation that appeared in the 2013 AR (p. 49):

> We will only successfully meet the challenges of today and tomorrow if all employees – from vocational trainees through to senior executives – consistently deliver excellence to ensure the quality of the Volkswagen Group's innovations and products for the long term and at the highest level. Outstanding performance, the success that comes from it and participation in its rewards are at the heart of our human resources strategy.

The pursuit of perfection put extreme pressure on employees at all levels, leading to rivalries and a deliberate avoidance of communication between members of different subunits. Again, this created a silo mentality in which solutions were individually derived and implemented. In addition to the lack of direct forms of communication, there were other signs that clearly showed the divisions between each subunit. Every department created its own environment with visual differences emphasised by different office layouts and decor. When I visited other departments, there would be little acknowledgement of my presence much less a friendly greeting: it seemed I was entering hostile territory. It is illustrative that when I could convince myself to contact another department, I much preferred email or phone rather than going to visit somebody across the invisible barriers that I perceived.

In the quest for growth, innovation was seen as vital. The VW approach was that innovation emerged from discipline, dedication, and the relentless pursuit of perfection. Mistakes got identified, but they were also seen as a sign of weakness. The fear of making mistakes permeated the organisation and was reinforced in very public ways. For example, heads of department would be expected to give weekly updates and would be publicly chastised if the performance of their subunit had fallen below expectations. In this way, competition between groups was actively maintained and deliberately managed further strengthening the boundaries among different subunits.

If mistakes took place employees would generally not discuss them. The fear of being publicly criticised or demeaned by colleagues was extreme. Successful managers were viewed as not making mistakes. Everyone knew how Winterkorn would chastise employees if the quality of a car part was deemed inadequate. Such demands for perfection allied to a fear of failure further

increased the likelihood of malfeasance. This was supported by a report in Süddeutsche Zeitung a German newspaper, in 2018, that emphasised the ways in which the ideals that were established at VW permeated the organisation and were not questioned, let alone challenged: Under the headli57ulfil57entent fulfillment of duty without objection" the newspaper described how employees at VW 57ulfilquietly fulfill their duty without questioning what they needed to do. Three years after the scandal this culture, based on following authority and practicing obedience has not yet been overcome" (Fromm, Hägler & Ott, 2018).

Homogeneous Thinking. The personal account and the documents clearly reveal how homogeneous thinking took hold at VW. The pattern was visible for employees at all levels with examples, though often subtle, serving as a constant reminder of what was expected. Good examples are provided in the ARs from 2009 and 2010 with Winterkorn pictured in conversation with his design chief Walter de Silva and then the Chief Astronaut from the European Space Agency, Wilhelm Schlegel.

> In the Company's headquarters in Wolfsburg, Professor Dr. Martin Winterkorn, Chairman of the Board, and Walter de Silva, Head of Group Design, discuss every single detail. Both are perfectionists. Sometimes they know what the other is thinking without speaking a single word…. The two men complement each other perfectly. [Winterkorn] is never satisfied: "There's always room for improvement." De Silva is of the same mold: "Many people equate creativity with complete freedom, but it is actually discipline that is the basic prerequisite for creativity." (AR, 2009, p. 16 and p. 19)

> The chemistry is right – thanks to physics. Prof. Dr. Martin Winterkorn, Chairman of Volkswagen AG, and Hans Wilhelm Schlegel, Chief Astronaut at the European Space Agency (ESA) in Houston, do not need long to find a common wavelength. Both have passed through similar schools of thought in the course of their scientific training. (AR, 2010, p. 31)

Both interviews highlight how VW's leaders were expected to think about their work. Furthermore, many VW managers were recruited from RWTH Aachen University, known as an elite training ground for engineers. Unsurprisingly, this common training bred common understandings of how to structure work, approach problems, and innovate. This was apparent from my own experience and reinforced in a newspaper report that noted that:

> Many Volkswagen managers who are said to be involved in the emissions scandal studied at RWTH Aachen University…. Lots of trainees that Volkswagen specifically recruits for management positions come from the university …. A network of alumni from the university seems to be involved in the emission scandal. (Bay & Dowideit, 2015)

This homogeneity of background was accentuated by the creation of "island cultures," silos in which similar thought processes and ways of viewing problems were created and from "which

information did not leak out" (Dpa, 2017) across subunit boundaries. The lack of questioning, fruitful discussion, or tolerance of differences of opinion were all important antecedents to the emergence of wrongdoing.

Hierarchical Rigidity. Homogeneity of thought was not the only way the organisation influenced its employees. Communication was expected to rigidly follow hierarchical lines without deviation. Therefore, any problems that were identified had multiple levels through which they had to pass, leading to multiple opportunities for them to be hidden or ignored. In this environment, I came across some employees who tried to expose problems when they emerged, but the organisational structures and boundaries in place functioned as a barrier to the flow of information. The diesel scandal at VW could possibly have been prevented if the concerns raised by engineers about the defeat device had resonated across the organisation. This is reflected by a report in the Süddeutsche Zeitung newspaper:

> A few weeks after the start of the emissions scandal at Volkswagen in 2015, VW employee Oliver S. testified as a witness to investigators in Lower Saxony. What S. had to report about the years of manipulation and the conditions at Europe's largest car manufacturer was remarkable. A colleague once told him how his manager forced him to use certain software. That software, also known as 'Defeat Device', was used to deceive authorities about the real pollutant emissions from diesel vehicles. (Busse et al., 2017)
>
> Engineers have repeatedly recommended stopping the [defeat device]. The VW system – the Winterkorn system during his reign – was therefore one in which the employees had to learn to cope if they wanted to climb up the career ladder in the strict organisational hierarchy…. In-house criticism of the manipulated engine software existed from the start. But the critics were either not heard or criticised for their part as questioners. Some were afraid of losing their jobs. (Busse et al., 2017)

People were held accountable for hitting targets in a very public way. "If you don't take part, you get fired, that was the announcement at VW in the past" (Busse et al., 2017). Socio-cognitive dissonance was endemic: employees would follow the directions of their managers even if they believed that those directions were problematic. As I found, compliance was easier than resistance. Together with the pursuit of perfection this hierarchical culture became one of the biggest problems in a rigid system which stagnated communication: the information flow was restricted and very much top down.

Furthermore, as employees advanced to managers and senior executives, they were very well rewarded but there was also an extreme pressure to continually perform at a high level. This pressure was transmitted down the hierarchy from one level to the next. The rigid hierarchical approach contributed significantly to creating the ground on which wrongdoing could flourish.

The personal account and the documents we collected made very clear how communication took place. Senior managers informed of a course of action would in turn pass on information down the hierarchy with little opportunity for discussion; any information flow up the hierarchy was very limited and strictly via the chain of command. For example, a very strict system of cost management resulted in employees producing report after report for managers without having the chance to challenge anything.

As rank increased in the organisation, so did salary, office size and other symbolic accoutrements. Senior managers, for example, could have two secretaries, their own conference room as well as meeting and relaxation space within their own office. This served to reinforce vertical boundaries in a very visible way. Again, the symbolism could be intimidating. I would walk faster, keep my head down and talk more quietly when entering the suite of senior managers' offices. This is how I experienced VW in the years up to the scandal: employees would not approach a higher manager but would strictly follow the chain-of command. This, allied to the significant rewards for those who followed the rules and achieved, further prevented any form of challenge to questionable forms of behaviour.

Preventing Participation. In line with the rigid hierarchical structure, and as we have alluded to above, there was a clear expectation that employees were expected to strive to meet objectives imposed by senior management and neither question the goals nor the methods to achieve them. As expressed in the AR 2010 (p. 31), "Employees must believe in the goals set." Again, the boundaries between levels were reinforced in a very explicit way. An example of this was provided when I was asked to complete the firm's annual employee survey, the "Stimmungsbarometer" in 2014. We would get the questions explained to us, but it was also made clear that if we selected an orange or red – rather than green – response, indicating some level of dissatisfaction, we would have to follow-up to explain our problem, something that made me feel uncomfortable. I made a comment about this and was told "I should not bite the hand that was feeding me." Criticism of any sort was not viewed positively by employees at any level. The main message from the "Stimmungsbarometer" was that employees would like to be able to feed more into decision-making processes. How they might do so was apparently ignored by senior management.

A further barrier to participation in any form of decision-making process was the lack of space for group or team meetings. Senior managers could use their personal meetings rooms to meet when and with whom they wanted. By contrast, other staff had immense difficulty in finding a

room for a meeting, making it harder to have meetings, work collaboratively or discuss any problems that had been encountered.

Post-Scandal

Following the emission scandal, VW engaged in a period of sustained transformation designed to ensure that something like Dieselgate could not happen again. The steps that were taken, following an extensive internal review supported by external consultants, reinforce our findings by pointing to the role of organisational design in creating an environment in which wrongdoing could take hold and flourish.

Flattening Hierarchies. A significant recommendation of the review was to dismantle the rigid hierarchies that had long been a feature of the firm. This process was reported in the 2019 AR indicating that this was not just an internal measure but also a very public and symbolic acknowledgement of a shift to a new way of working (AR, 2019, p. 149). A "code of collaboration" as a foundation for a new, decentralised working style also got created. This new way of working was described as "genuine, straight forward, open-minded, and united" (Transform 2025+, 2016). The flattening of hierarchies and decentralisation of decision-making had a direct influence on my daily work as I gained much more responsibility for my own projects. The removal of vertical boundaries was further explained by the new CEO Matthias Müller in an interview with Johannes Winterhagen for Momentum, VW's magazine, in 2015 (Winterhagen et al., 2015).

> Winterhagen: *You just raised the subject of culture. What is your notion of good leadership?*
>
> Müller: First and foremost open communication, readiness to accept responsibility, and a bold entrepreneurial spirit. We may have been remiss in not fostering this attitude in the past…The crucial point is that we as the Board of Management live up to the new form of cooperation, day in, day out.
>
> Winterhagen: *What does that mean for you personally?*
>
> Müller: Before I make a decision, I talk to the employees who are best able to give me the facts and information I need – regardless of where they stand in the hierarchy. And I listen very carefully, especially when opinions differ from my own

Horizontal Collaboration. In addition to the breaking down of vertical hierarchies and the more decentralised approach to decision-making, there was also an emphasis on horizontal subunits becoming more collaborative. In an organisation that had previously emphasised the independence of subunits and demanded competition between them, this was highly significant. Reinforcing this collaborative approach, the word "together" became emphasised in public

communications (e.g., AR 2017) and synergies were actively sought through cross-brand development alliances (Transform 2025+, 2016).

The shift in corporate governance and the understanding of compliance with industry regulators as a task for everyone was quickly adopted throughout the organisation. I experienced this directly with my team leader soliciting ideas from the team as opposed to them being simply passed down the hierarchy for unquestioning implementation. Those and other design changes were reported by US monitor Larry Thompson who had been charged with investigating VW following the scandal. VW enhanced its reporting structures and worked on internal processes and systems in different subunits across the company including technical development, governance, and legal compliance (Thompson, 2020).

New Values. Corresponding to the structural changes described above, VW also developed new values that were described in a new code of conduct:

> The Code of Collaboration formulated as part of the future program is the foundation on which the Group strategy rests. This Code describes how collaboration is to take place within the Group and between individuals in their day-to-day work. Its core values are encapsulated in the terms "genuine," "straightforward," "open-minded," "as equals," and "united." (AR 2017, p. 51)

Furthermore, under the headline "Everything has to do with the emission scandal" in Busse et al., (2017) Werner reflected on how Volkswagen had been very hierarchical with an emphasis on authority. Changing this was central to the steps to transform VW's culture.

CEO Müller called for a realignment of structures and mindsets, with the former focus on growth and becoming the biggest car maker in the world revised: "chasing records is not what drives Volkswagen" (AR, 2016, p. 8). Those cultural changes also emphasised the importance of "we" not "me" (AR, 2018, p. 149). This approach was summarised in the "Together4Integrity" campaign published in the AR 2020. Employees were seen as important stakeholders with their opinions, assessments and criticisms actively sought. Emphasis was put on the creation of a corporate culture with an open work environment characterised by mutual trust and collaboration with integrity in decision-making.

> Herbert Diess, who took over as CEO in 2018, maintained Müller's approach, stating:
>
> I am very proud of what our more than 660,000 employees have achieved in these challenging times…. We have implemented positive changes in our corporate culture. This was also confirmed in September 2020 by the final report of the team of the US Monitorship, with which we worked for four years on improving processes, creating more transparency, and reducing hierarchical thinking in the Group. (AR 2020, p. 9)

Our insight into VW allows us to more fully understand how the creation of organisational structures and boundaries between individuals and subunits fostered an environment in which Dieselgate took place. As we show above, several factors came together that increased the likelihood of this happening. The strategy of aggressive growth with the objective of becoming the leading carmaker in the world, allied with a culture in which competition rather than cooperation became normalised and perfection at all levels was demanded and rewarded, were central components. Allied to this was the homogenous thinking that built up in parts of the organisation and the belief in a strict hierarchical arrangement in which information predominantly flowed down from the top with any challenge or even suggestion from lower down unlikely to permeate up. The outcome of this was an organisation in which boundaries were hardened, silos created, and broad understanding of what was happening in different parts of the organisation diminished. When there were occasional voices of dissent, the rigid boundaries helped to ensure that they were isolated and/or ignored. As we will discuss below, the outcome was an environment in which wrongdoing could take place.

Discussion

Our data allow us to develop theory about the ways in which boundary work contributes to organisational wrongdoing in three ways. We do this by theorising how a combination of socio-cognitive, horizontal, and vertical boundaries create an infrastructure of organisational design that allows organisational wrongdoing, prevents it being challenged, and ultimately normalises it in everyday activities. We also show how socio-cognitive, horizontal, and vertical boundaries mutually reinforce each other. Recently, Brahm et al. (2021) demonstrated how the external boundaries of organisations can significantly influence the ways in which senior managers can act. Our work extends this understanding by focusing on the impact of internal boundaries. More specifically, we show how the creation of socio-cognitive, horizontal, and vertical boundaries will directly influence the daily behaviours of organisational actors and can ultimately lead to wrongdoing. It is also worth emphasising that the circumstances in which boundaries were created, and the impact that they had, were systemic. The conditions that led to them are not unique to VW and thus we contend that wrongdoing is likely to emerge in any organisation characterised by similar internal boundary arrangements.

Socio-Cognitive Boundaries

An important contribution of our work is to demonstrate the ways in which socio-cognitive boundaries become established and maintained to create a foundation for wrongdoing. That is,

the design of an organisation can shape the ways in which people think such that problematic or illegal practices are seen to be justifiable and even normalised. Socio-cognitive boundaries describe the process by which attention, memory and problem-solving are part of learning processes of individuals. Cognitive processes emphasise that social factors like norms, social expectations and inter-personal relationships influence the learning process (Garrison, 1995).

Gaim et al. (2021) explained how organisational actors pretend to achieve a task to cope with a goal that is out of reach. In our case, VW used the so-called "defeat device" to give the impression that it was achieving desirable emission target levels. We extend this observation by showing the mechanisms by which specific ways of thinking are established and reinforced. Our findings demonstrate how socio-cognitive boundaries can work as a perceptual filter that supports the creation and maintenance of illusory practices over a long period of time without them being questioned.

As has been established elsewhere, those who share experiences, including formal education, corporate orientations, extracurricular engagements, and other activities can develop similar interpretations of how to act and even think (e.g., Dacin et al., 2010; Dempsey, 2015). As we show, over time, what we refer to as socio-cognitive boundaries can become established to create divisions between groups of people who think and act in a particular way and those that do not. Such shared understandings can occur wherever boundaries are formed, from the organisation as a whole to individual subunits or even smaller social groups.

Langley et al. (2019) categorised boundary work as being competitive, collaborative, or configurational. We build on this by elaborating how boundary work processes initially emerge in organisations. Our findings indicate that socio-cognitive boundaries shape how individual organisational actors and groups are likely to frame actions and ideas. This is important as it shows that we should not only focus on why wrongdoing takes place but how it can go unchallenged in organisations over sustained periods of time. If individual organisational actors and groups are repeatedly reminded of the need for extremely high levels of performance with the avoidance of mistakes paramount, there will likely be an avoidance of critical interrogation of, or even reflection upon, the processes that underpin results. Socio-cognitive boundaries can harden, and the pursuit of growth and perfection can lead to a focus on what is produced rather than how it is produced. This can lead to an emphasis on ends over means.

In practice, organisations reinforce socio-cognitive boundaries in various ways, including through the recruitment of employees who share the same mindset and/or who have trained or

studied at the same institution. Such graduates are often likely to think homogeneously as they have been taught in a similar manner and exposed to similar experiences. Such socio-cognitive boundaries hinder diversity and critical thinking. We know that organisations recruit graduates from specific universities to find actors that are similar to those working in a firm already (Dacin et al., 2010; Rivera & Tilcsik, 2016). Furthermore, Balch and Armstrong (2010) and Palmer (2013) have identified self-referential value systems in groups that can result in the approval of wrongdoing. We extend this work by theorising how recruitment and socialisation are key planks in the establishment of such a value system and showing the mutually constitutive role of socio-cognitive boundaries in this process. Socio-cognitive boundaries can therefore be seen as a root cause in the establishment and maintenance of organisational wrongdoing. Future research into how socio-cognitive boundaries shape the ways of working in different organisational settings, and the implications of this for potential wrongdoing, would be useful.

Horizontal Boundaries

Horizontal boundaries describe the divisions put into place between different subgroups at the same hierarchical level (Gieryn, 1983). Past research has shown that organisational design leads to two different kinds of control of organisational actors and their action through promoting or hindering communication, exchange, and teamwork. There are obtrusive controls purposefully put in place by the organisation, such as administrative systems, and unobtrusive controls such as restricting who has access to communication channels (Palmer, 2013). The latter are sometimes not established purposefully but emerge over time. Unobtrusive controls can become particularly problematic for the flow of information because they are not identifiable in, for example, organisational charts and thus are difficult to manage. In situations where a competitive environment between different subunits exists, information flows can further atrophy. Over time, horizontal boundaries become increasingly reified. Balch and Armstrong (2010) noted something similar in their observation of a cocoon effect in organisations: the building of a self-referential value systems and sub-cultures within individual departments. This can become very dangerous, as we show: while silos are established to achieve goals, as boundaries harden, so the activities to achieve those goals go unchallenged because of the lack of scrutiny either across or within subunits. Kellogg (2009) explained the importance of individuals from different parts of an organisation finding free spaces where they can come together to interact. At VW, we found just the opposite to great detrimental effect.

In practice, horizontal boundaries can be hardened by what are often considered to be non-divisive decisions that are often made for efficiency reasons. While on paper it might make

sense to provide different clothing to identify groups of workers and provide different canteens in a big manufacturing site to allow employees enough time to eat, such practices reinforce divisions. The location of restaurants and canteens, the clothing of workers, and the geographical distance between subunits can all reinforce boundaries as contact with, and information from, other subunits diminish. As boundaries harden, subunits become increasingly self-referential and stop looking for input or scrutiny from elsewhere.

As we found at VW, horizontal boundaries between subunits can be reinforced with socio-cognitive boundaries. As boundaries become more rigid and are less permeated by external ideas, transfer of personnel, or external scrutiny, so wrongdoing is more likely to develop. Practices that may be relatively minor breaches of what is acceptable can go unchallenged leading to more egregious cases of malfeasance.

Vertical Boundaries

Comeau-Vallée and Langley (2019) noted how competitive boundary work established hierarchical relations among professions. We build on this observation by showing how the reconstruction of social relations and reification of vertical boundaries between different hierarchical levels within organisations can create systems of exclusion that in turn increase the potential for wrongdoing. Of particular interest is the way in which power is concentrated at certain levels or is dispersed, what happens when the only worthwhile flow of knowledge is top down, and how impermeable boundaries are to the upward flow of information, especially that which is unpalatable. As we have shown at VW, there are actions and approaches that can make boundaries more rigid and in doing so increase the likelihood of wrongdoing. For example, if managers are setting very aggressive, non-negotiable growth targets to subordinates this can create an environment in which performance outcomes are valued above anything else. While competitive boundaries describe the establishment of boundaries between rank, we need to pay attention to how this organisational set up creates silos. If subunits are put into positions of competition rather than cooperation with leaders held publicly accountable, vertical boundaries become hardened around the silos created.

As we point out above, silos are usually considered in the context of horizontal boundaries, but an important outcome of our work is that we also need to consider the ways in which boundaries harden between different vertical levels. In this setting employees do not talk truth to power. Information does not get shared, and problems are not communicated or escalated as needed. Again, this also contributes to increasingly homogeneous working and thinking environments

through the gradual process of separation resulting in decision-making that often goes unchallenged.

Conclusion

In this paper, we examine how boundary work challenges our understanding of the emergence and reification of organisational wrongdoing. Our concept of socio-cognitive boundaries allows us to explain not only how wrongdoing emerges but also how it can remain unchallenged in an organisation. Furthermore, as we show here, socio-cognitive boundaries harden vertical and horizontal boundaries, and provide insight into how they are created, entrenched, and institutionalised. With regards to horizontal boundary work that takes place to enable subunits of the organisation to work effectively, we have found it can lead to a lack of communication and difficulties of moving between subunits. Organisational spaces created for exchange and representation can lead to the creation of an internal elite isolated from daily organisational life with a resultant organisational design that defines "in" and "out" groups, normalises certain behaviours, and limits communication across intraorganisational boundaries. Case studies of the Dieselgate scandal at Volkswagen have discussed "removing the tumor" (e.g., Woodyard & Bomey, 2015) implying that this would allow things to return to "normal." This is predicated on a belief that wrongdoing is the result of a small number of dishonest or misguided people. We further this explanation by showing how the socio-cognitive, horizontal and vertical boundaries that were created at VW heavily contributed an environment in which wrongdoing became highly likely.

Palmer and Moore (2016), observing that organisational wrongdoing is still perceived as one person doing something wrong, called for researchers to look at dynamics that cause organisations and employees to act in certain ways. In responding to this call, we have shown how the establishment of boundaries is one of these key dynamics. Boundaries often created to achieve efficiency can lead to the isolation of decision makers and the exclusion of groups from important operating practices to disastrous effect. Boundaries establish visible inequalities in status, knowledge, and power, hindering critical questioning, occluding processes, and creating a stagnant environment. In these conditions – in any organisation – wrongdoing can emerge, become established, and end up becoming normalised.

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CHAPTER 5 - UNCOVERING THE FESTIVAL ORGANISATION (PAPER 2)

Abstract

Our research was motivated by a fascination with the enduring success of the Edinburgh Festival, a well-established organisation that has confronted significant challenges in order to thrive over time. Through our investigation, we uncover the mechanisms by which the Edinburgh Festival has managed to cultivate a dynamic interplay between two seemingly contradictory forces: the competitive endeavours of its constituent festivals and the inherent advantages derived from reciprocal collaboration. While existing research has acknowledged the possibility of collaboration in highly competitive contexts, it is apparent that this is only achieved with considerable difficulty and very rarely over an extended duration. By contrast, we show how sustaining a balance between competition and collaboration emerged as a defining characteristic of what we term the Festival Organisation form. Our study extends our theoretical understanding of organisational design and boundary work by uncovering the mechanisms by which the Festival Organisation is able to maintain this. In particular, we elaborate how the development of inspirational competition, an outcome of the compressed temporal and geographic proximity in which the festivals operate, is central to the success of this type of organisation.

Keywords

Organisational design, boundary work, status, qualitative research

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Introduction

From its earliest days, a central "mandate" (Stern & Barley, 1996) of organisation theory has been to identify and explain differences in the internal organisation structure and processes of formal organisations, and the outcomes of those differences (Hinings & Meyer, 2018; Monteiro & Adler, 2022; Scott & Davis 2015). Understanding such differences remains a highly significant research theme not least because of the emergence of important yet understudied organisational forms (Mintzberg, 2023). In this paper we examine the 'Festival Organisation', which has distinctive features and is becoming increasingly apparent around the world. As such, it warrants attention but remains ill-understood. Further, the "themed, public celebrations" (UNESCO, 2015: 9) of festivals play a significant contributing role to social inclusion, recognised as "an important institution of the democratic state" (Wright, Meyer, Reay, & Staggs, 2021: 43). Given the growing concern with declining "institutional trust" (Lounsbury, 2023), understanding organisational forms that can counter such trends is also persuasive motivation for our study.

We define the Festival Organisation as a permanent formal organisation comprised of multiple constituent festivals that collaborate whilst competing with one another for audiences, venues and funding.[4] In effect, the constituent festivals are akin to departments within an organisation. A distinctive challenge that emerged in our setting was how to develop and maintain a productive tension between the competitiveness of constituent festivals whilst capturing the benefits of reciprocal collaboration. Work in other settings has shown that this pursuit of "dual gods" is highly challenging (Smith & Besharov, 2019). Thus, the purpose of our paper was to uncover how Festival Organisations are structured in a way that has facilitated sustained competition and collaboration among constituent festivals over an extended period.

To develop our theoretical insights, we draw on the boundary work literature (Langley, Lindberg, Mørk, Nicolini, Raviola, & Walter, 2019). Using archival materials and interviews we trace how the Edinburgh Festival grew from its beginnings in 1947 to become widely recognised as *the* exemplary Festival Organisation (McLean, 2022) with eleven constituent festivals, one of which, the Fringe, is the second largest ticketed event in the world, surpassed only by the Olympic Games (British Council, 2022).

[4] Festivals have been studied elsewhere as "temporary field-configuring events" (e.g., Schüßler & Sydow, 2015). Our interest is in *permanent* festivals that separate the moments of artistic performance from the planning that occurs for the rest of the year. These organisations have full-time, year-round employees.

Our case study revealed how competition and collaboration are precipitated by *inspirational competition*, which is an outcome of *compressed temporal and geographical proximity*, defining features of the Festival Organisational form. This is also helped by the *status similarity* and *temporal rhythm* of constituent festivals and by an *overarching boundary* that separates a Festival Organisation from outsiders. Further, we uncovered how sustaining an appropriate balance between competition and collaboration is accomplished by the *spaces for negotiation* provided by the festival's temporal rhythm and a novel "guard rail" (Smith & Besharov, 2019) connected to the institutional context.

Our insights also contribute to boundary work theory by introducing a previously neglected form of competition, inspirational competition, that bridges boundaries between organisations. Further, we uncover mechanisms comprising temporal and geographical compression that determine why competitive and collaborative relationships across boundaries persist. In doing so, we respond to the call from Langley et al. (2019) for research that furthers our understanding of how the mutual benefits of competition and collaboration can be sustained.

Theoretical Background

Organisational Design

One of the primary interests of organisation theory is understanding differences between organisational designs (Hinings & Meyer, 2018). Early studies explored how particular bureaucratic forms could enable or hinder innovation (e.g., Burns & Stalker, 1961; Weber, 1978), and how those arrangements were shaped by particular "contingencies" such as organisational size and environmental uncertainty (Donaldson, 2001). More recent studies have probed organisational forms such as professional partnerships (Greenwood, Hinings, & Brown, 1990; Morris & Empson, 1998), cooperatives (Slade Shantz, Kistruck, Pacheco, & Webb, 2020), family businesses (Micelotta & Benedetti, 2023), refugee camps (de la Chaux & Haugh, 2020), temporary organisations (Jones, 1996; Bechky, 2006), social enterprises (Battilana & Dorado, 2010; Pache & Santos, 2010), social purpose organisations (Klein, Schneider & Spieth, 2021) and collaborative organisations (Adler & Heckscher, 2018). Implicit in these studies is the challenge of achieving appropriate levels of differentiation and integration (Lawrence & Lorsch, 1967). Moreover, although the term may not always be used, the theme of how to differentiate and integrate activities is, essentially, the core theme of boundary work. Differentiation refers to the establishing of boundaries among organisational units and integration to how those boundaries can be bridged.

Boundaries and Boundary Work

In early research into organisation theory, the boundaries of interest were typically those found between departments, such as marketing, production, and research and development (Lawrence & Lorsch, 1967) or the boundary around the organisation itself (Gieryn, 1983). An assumption that "served organisational analysis for decades" was that these boundaries are "stable and unambiguous" (Hernes, 2004: 10). However, current theorising recognises that boundaries can be more flexible and adaptive than previously assumed; and, that they may or may not have "resilience" (Quick & Feldman, 2014). Moreover, there are multiple forms of boundaries including, but not restricted to, cultural, status, material and temporal boundaries (Langley, et al., 2019). Recognition of the importance and range of boundaries has led to increasing interest in what Gieryn (1983) termed "boundary work."

Boundary work constitutes "the purposeful, reflexive effort of individuals, collective actors, and networks of actors to shape a social boundary" (Lawrence & Phillips, 2019: 158). The basic purpose of a boundary is the construction of 'in' and 'out' groups; or, more bluntly, categories of 'us' and 'them' (cf. Berthold, Helfen & Wirth, 2021). In organisation theory, studies have primarily explored the boundaries of organisations (Santos & Eisenhardt, 2005), occupations (Meyer & Allen, 1997; Bechky, 2003; Reay, Golden-Biddle & Germann, 2006) and institutional fields (Zietsma & Lawrence, 2010; Holm, 1995). In these studies, organisations, occupations and fields are 'bounded' in terms of membership criteria, purposes and goals, and by the routines and practices that define, link and differentiate one organisation/occupation/field from others. Boundary work thus has two purposes: reinforcement of the defining features of an organisation/occupation/field and protection from outsiders.

The most studied category of boundary work is "competitive" (Langley et al., 2019). Here "people defend, contest and create boundaries to distinguish themselves from others to achieve some kind of advantage" (Langley et al., 2019: 9). Competitive boundary work can take various forms. One form involves defending jurisdictional boundaries and the status and privileges associated with them (Gieryn, 1983; Lamont & Molnar, 2002; Greenman, 2012), as when physicians seek to reinforce the boundary between themselves and other occupations such as nurses (e.g., Bucher, Chreim, Langley & Reay, 2016; Lefsrud & Meyer, 2012; Weber, Kortkamp, Maurer & Hummers, 2022). A second is the contesting of boundaries, illustrated by Suddaby and Greenwood's (2005) analysis of how professional firms used rhetorical devices to define the boundary between their jurisdictions (see also, Hobson-West, 2012). A third form

of competitive work is the creation of new boundaries around an emerging jurisdiction (Santos & Eisenhardt, 2005; Mikes, 2011).

"Collaborative" boundary work, in contrast, describes efforts to achieve cooperation across boundaries (Langley et al., 2019). Unlike competitive boundary work, collaborative work seeks to respect and retain jurisdictions defined by a boundary, but also to enable members of those jurisdictions to selectively 'bridge' boundaries in order to achieve mutual benefits. Boundaries, in this sense, not only differentiate groups, but bring them together (Berthold, Helfen & Wirth, 2021, Adler & Heckscher, 2018). An example is McPherson and Sauder's (2013) account of how individuals from three different professions collaborated in their day-to-day interactions in drug courts and how those regular interactions furthered the collective ability to manage the challenge of institutional complexity. A key point of the McPherson and Sauder study is that each profession recognises that collaboration has benefits, and, that the core values of other professions – their jurisdictional boundaries – have to be respected. De la Chaux, Haugh and Greenwood (2018) also illustrated collaborative boundary work in their study of refugee camps, in which two very different socio-cultural groups, refugees and officials, acknowledged and respected the other group's authority in their geographical part of the camp. Importantly, de al Chaux et al. (2018) showed how "respected spaces" on either side of the geographical and cultural boundary were complemented by formal meetings that bridged the boundary and served as "listening posts" for emerging tensions. The importance of designated spaces for communication in collaborative boundary work is also well illustrated by Giamporcaro, Gond and Louche's (2023) work on the design of public spaces.

Langley et al. (2019) acknowledged the insights provided by such work but also highlighted questions that require further attention. They persuasively noted that relationships between organisations and/or occupations are unlikely to be entirely competitive: some measure of collaboration is usually involved. Further, the pattern of relationships may be affected by the number of organisations and occupations involved. Hence, we need to better explore the interaction of competitive and collaborative efforts in contexts that involve multiple rather than simply two organisations or occupations. There is also the need to cover "longer periods of time" in order to better capture how and why boundaries and relationships might change and affect underlying patterns of privilege (Langley, et al., 2019: 720). Further, studies of boundary work are often static and miss the possible unfolding nature of boundaries, such as the loss of balance between the goals and values of different players that are engaged in collaborative work (Battilana, Sengul, Pache & Model, 2015, Ometto, Gegenhuber, Winter & Greenwood, 2019;

Santos, Pache & Birkholz, 2015). It is thus apparent that "we lack an in-depth understanding of the processes involved" (Smith & Besharov, 2019: 4) in such work.

Guided by our theoretical interests in organisational design and boundary work, and our observation of their apparent importance in understanding the longevity of the Edinburgh Festival, we set out to uncover how the organisation has been able to sustain the complementary benefits of competition and collaboration among its constituent festivals. We next describe the research setting along with the methods that we used to collect and analyse data.

Methods

Research Setting

Festivals have become common world-wide. The 2015 UNESCO report stated that Germany hosted 240 festivals, France approximately 1000, Spain 700 and Italy 200. Not all festivals are the same – they range from dramatic arts and cinema to the visual arts and music. Moreover, some festivals focus on one theme (e.g., music) whereas others, including our case study of the Edinburgh Festival, are composed of several different disciplines. The importance of festivals is not only their economic impact but also their "role in giving a sense of identity, shared value and belonging, in preventing exclusion" (UNESCO, 2015: 9). Given these important social and economic effects, it is not surprising that the UNESCO report calls for more research into understanding how festivals can be successfully structured and designed.

Our case study, the Edinburgh Festival, is "the world's largest arts festival" (UNESCO, 2015: 17) and has a 76-year history. In 2019, 4.9 million people attended festival shows, generating £313 million in revenue (Edinburgh Festivals, 2022). However, as we learned early in our study, and elaborate in the Findings section, the early decades of the Edinburgh Festival were filled with tensions and disputes as multiple festivals competed for resources and audiences. It was only after 1998 when a formal Festival Organisation was established to pull the several constituent festivals, detailed in

Table 5.1, together so that the benefits of competition and collaboration were achieved. Since then, Edinburgh has been internationally acclaimed as an exemplary festival city.

Table 5.1. Festivals in Edinburgh

Festival	Founding Date	Show Time
Edinburgh International Festival	1947	August
Edinburgh International Film Festival	1947	August
Royal Edinburgh Military Tattoo	1950	August
Edinburgh Festival (Fringe Society)	1958	August
Edinburgh Jazz & Blues Festival	1978	July
Edinburgh International Book Festival	1983	August
Edinburgh Science Festival	1989	April
Scottish International Storytelling Festival	1989	October
Edinburgh International Children's Festival	1990	May/June
Edinburgh's Winter Festival	1993	December
The Edinburgh Art Festival	2004	August

Research Design

In line with Langley et al.'s (2019) call to study boundary work between more than two parties, Edinburgh Festival is a particularly revelatory case (Eisenhardt & Graebner, 2007). It provides a setting that features boundary work among eleven festivals organised under the umbrella of the Festivals Edinburgh organisation. Table 5.2 provides an overview of each data source and how the data were used in our analysis. The data that we collected allowed us to examine design and boundary work over time, and their corresponding impact on the Festival Organisation.

Table 5.2. Overview of the Data

Data Type	Data Description	Use of Data in Analysis
Interview Data		
Primary interviews (56)	Interviews conducted with representatives from the city, the festivals and other stake holders (City Officials,Government Officials,Other stakeholders,Festival CEOs/Directors)	This data source was used to understand the development of the Festival Organisation and to code the experiences of each festival involved in terms of organisational structure elements (e.g. consensual decision making), and boundary work (e.g. collaborative).
Secondary interviews (15)	Previously published interviews with festival directors	This data source was used to code key events in the Festival Organisation (e.g. founding) as well as the different perspectives of the constituent festivals.

Archival Documents		
Historic Environment Scotland/ Edinburgh City Archive (391)	A historical collection of city council meeting minutes and photographs of the city.	Those data were used for coding boundary work and uncovering differences between the constituent festivals.
Glasgow University Archive (48)	Archive of the Fringe Festival (flyers, maps, performer information, and tickets)	This data source was used to extend the festival data set from the early years.
Books (2)	Historical books describing the first decades of the Fringe Festival and the International Festival	Additional text data from these sources were used to identify key events of the two festivals from their first three decades and to code the boundary work between them
Strategy Documents		
Thundering Hooves Report (93 pages)	First strategy report conducted by a consulting company for the constituent festivals	These data were used as a supplement to interviews in coding the characteristics of the Festival Organisation and the boundary work taking place. The sources were tied to reflection processes and changes in the Festival Organisation. They showcased a collective perspective of important moments of the festivals to move the analysis beyond individual festival perspectives.
Thundering Hooves 2.0 (87 pages)	Second strategy report conducted by a consulting company for the constituent festivals	
Future Fringe Report (13 pages)	Internal documents of the Fringe Society revealing future development plans	
Fringe Development Goals (3 pages)		
2030 Vision for a Resilient and Ambitious Festival City (9 pages)	Various collective strategy document of the constituent festivals	
Development of 2030 Festival City Version Summary of Feedback from city communities of interest [March 2022] (32 pages)		
Draft Festival City Vision To 2030 [August 2021] (3 pages)		
Edinburgh's Festivals: A Collaborative Story (63 pages)		
Report for Festivals Edinburgh and Policy Evidence Centre (PEC) (78 pages)		
Additional Secondary Sources		
Sources on trends in the Edinburgh festival scene (the *Stage*, the *Scotsman,* the *Guardian* Documentary "*The World in One City*")	Secondary sources in form of magazine and newspaper articles and a film documentary Various newspapers and magazine articles as well as a documentary from one of the festivals (Stage Articles, Scotsman Articles, The Guardian, Documentary "The World in One City")	These data sources were used to provide context and across the cultural festival scene and to further understand relationships among festivals.

Data Collection

We drew upon two sources of data, interviews and documents, to capture the structure of the Festival Organisation and to uncover its primary performance challenges. It became evident in our data collection that a critical juncture emerged in the 1990s, when tensions between several of the festivals reached a tipping point. We thus paid close attention to capturing not only the history of festivals in Edinburgh from 1947, but particularly the establishment and functioning of Festivals Edinburgh from the late 1990s.

Documents. We began with archival research focusing on the emergence and establishment of Edinburgh as a festival city. We accessed historical documents and strategic reports that allowed us to develop our initial understanding of the case as well as to subsequently triangulate insights from the interviews. The documents that we collected comprised newspaper articles, books, documentaries, consulting and other reports, photographs, marketing material, council meeting minutes, websites and newsletters of the festivals. The first author visited the National Library and the Central Library Archive to familiarise herself with Edinburgh's history and important cultural events. We next visited the Edinburgh City Archive and examined meeting minutes from 1946 to 2022 to understand the role of the city council. We also visited the Fringe archive at Glasgow University, which holds a large collection of flyers, letters, pictures, booklets, and newspaper articles. All relevant documents were electronically scanned and filed in OneDrive folders. In addition to the insights into the structure and function of the festivals, this process also helped us to identify individuals to be interviewed.

Interviews. We conducted 56 primary interviews and gathered an additional 15 secondary interviews (see Table 5.2). We talked to senior government officials, directors of the constituent festivals, and other stakeholders, including leaders of public bodies Creative Scotland and EventScotland, prominent in the development of the Festival Organisation. Six individuals were interviewed twice in order to provide additional insight into emergent findings. All interviews were semi-structured, with questions designed to uncover the structure of the Festival Organisation, the boundaries among the constituent festivals, and the overarching performance challenges. Interviews lasted between 45 minutes and 1 hour and 58 minutes, with an average length of 68 minutes, and were digitally recorded and transcribed. In addition to identifying potential participants through the documents that we collected, we also engaged in a snowball sampling strategy whereby each participant was asked to recommend additional people to contact.

We conducted 18 interviews and then read through the transcripts to gain some initial insights into the formation of the Festival Organisation and its structure and processes. Based on this initial analysis, we went back into the field and conducted 10 more interviews to sense check our emerging understanding and collect additional data. This prompted us to conduct another wave of 28 interviews and to ask more specific questions around the uniqueness of each festival, their collaborations with the other festivals, and how those collaborations were experienced. The last wave of primary interviews was supplemented with 15 secondary radio and television interviews with festival directors and other officials that helped us to further understand the development of the Festival Organisation at different points in time.

Data Analysis

In our abductive analysis, we travelled back and forth between our data, the literature and emerging theory (Dubois and Gadde, 2002). In this process of gradual abstraction, we categorised the raw data, linked categories to themes, drew organisational structures, and aggregated the themes to develop theoretical insights (Pratt, Rockmann, & Kaufmann, 2006). Our analysis involved four different stages.

Stage 1: Understanding the Festival Organisation. Our first objective was to get a good understanding of what constituted the Festival Organisation. We initially read through the archival documents which allowed us to get a good overview of the major developments that resulted in the establishment of the festivals that comprised the Edinburgh Festival. From this, we then coded our first wave of 18 interviews to start to identify the motivations and barriers involved in delivering festivals, and the rationale and processes that led to the creation of Festivals Edinburgh. What emerged as an interesting puzzle was the way in which the structure of the organisation emerged from a combination of the competitive history of the festivals and the more collaborative relationships that subsequently seemed to have developed. We were intrigued as to how this took place, something that led us to think more theoretically about the influence of boundary work. We also established a timeline depicting the development of the Festival Organisation.

Stage 2: Identifying Boundary Work. After returning to the literature, we decided to reanalyse the data to examine the ways in which competitive and collaborative boundary work took place. Consistent with the boundary work literature (Langley et al., 2019), we conceptualised the actions and practices of the festivals involved as ‘competitive boundary work’ and ‘collaborative boundary work’. We then carried out another wave of 10 interviews to ask

specific questions about collaboration and competition among the stakeholders of the Festival Organisation. Through talking to Festival directors and other stakeholders, we focused on uncovering the distinctive features of the Festival Organisation.

Stage 3: Emerging Characteristics. The third stage was based on an observation that we encountered during the second stage: why do organisers of festivals and other major events around the world use the "Edinburgh model" as a template? This led us to further interrogate the data to refine what characterised the Festival Organisation. We identified seven characteristics through several abductive rounds of coding: organisational structure, sustained success, inspirational competition, temporal rhythm, temporal and geographical proximity, and supportive collaboration.

We reflected on our observations as we reread the interview transcripts and rewatched the secondary interviews, we were struck by the consistent responses of the Festival Directors about the Edinburgh Festival as a family of festivals that maintain their individual characteristics yet are still united as the 'Edinburgh Festival'. We analysed the first 28 interviews again this time specifically focusing on the development of relationships among the festivals.

We drew connections between the interviews *as* we conducted 28 additional interviews to further interrogate our emerging understandings. To provide a detailed example of how our coding developed we elaborate the emergence of one defining characteristic of the Festival Organisation, status similarity. Status similarity appeared to be an important characteristic for the Festival Organisation to function effectively. Our coding revealed the importance of the equal recognition of the constituent festivals as the worlds' best cultural festivals, first by government officials and later by other festivals. This mutual recognition stemmed from the desire of City government officials to bring the leaders of the different festivals together to discuss common concerns. Over time, this led to a recognition across the festivals that they all held similar status as world class events. This in turn resulted in greater mutual appreciation and a corresponding desire to understand how the festivals might be able to work collectively rather than independently. While it took time, this eventually resulted in a situation in which the constituent festivals, according to an official from the Fringe Festival "felt part of one festival, the world-wide known Edinburgh Festival". An official from the Fringe Festival also revealed that crucial components of this were the ways in which the festivals agreed to come together to "speak with one voice" and "refer to each other as a family of festivals." Our analysis showed that festivals collaborate on operational and strategic projects but also motivate each

other to perform and compete for funding. The success that the Festival Organisation achieved with this structure was highly unusual.

Stage 4: Developing Theory. To theorise from our data, we returned to the literature on organisational design and boundary work. This helped us to further refine some our analysis and in particular led to the emergence of our theoretical model.

Establishing Trustworthiness

In qualitative research there is always "an uncodifiable step that relies on the insight and imagination of the researcher" (Langley, 1999: 707). Verifying the "imaginative leap" from data to theory is not easy. However, to establish the trustworthiness of our analysis we used several procedures (Gioia, Corley, & Hamilton; et al., 2013; Lincoln & Guba, 1985). First, we engaged extensively with the field, both through engagement with the data over an extended period and by two members of the research team attending Festival events over multiple years. Second, we triangulated across data sources (Guba & Lincoln, 2005) by interviewing an extensive range of actors and analysing numerous documents (Eisenhardt & Graebner, 2007). Third, whereas one author became deeply immersed with the local context, two others provided "the potential for distancing" (Langley, Smallman, Tsoukas, & Van de Ven, 2013: 6) by deliberately acting as "devil's advocates" (Ometto et al., 2019) to allow us to sense check our emerging understandings. Where appropriate we also collected additional material to challenge our interpretation of events, such as from archival sources. Fourth, we presented our emerging themes to some of our key informants as a way of further checking what happened and our evolving interpretations (Guba & Lincoln, 2005).

Findings

Our findings are presented in two sections. To sharpen our understanding of the Festival Organisational form we first look at the origins of the festivals in Edinburgh and report how the increasing tensions among the festivals prompted the Council to create a structure that would facilitate greater levels of interaction among them. In the second section we focus on how this structure developed into Festivals Edinburgh and reveal the defining design arrangements and practices that shape and contribute to its success.

The Rise of the Festivals: 1947 to 1998

As we show in Figure 5.1, the Edinburgh festivals did not all start at the same time. However, a key feature is that the majority have settled on August for showtime. Performing at the same

time amplified the competition between the festivals; but it would also, as we will show, contribute to their later collaboration and the international success of Festivals Edinburgh.

Following the end of the Second World War, the Lord Provost of the City of Edinburgh foresaw the benefits of hosting a classical music festival and in 1947 established the International Festival. As a Fringe Festival CEO told us: "The International Festival … was the initiative of the City Council (who) saw it as … a beacon of light after the Second World War, and it was." While the International Festival showcased elite performers of classical music, ballet and opera, eight theatre groups, which were not invited to the International Festival, also came up in Edinburgh to perform on what they saw as the 'fringe' of the International Festival. What became known as the Fringe Festival subsequently grew from year to year with its artists using churches, pubs and other unconventional venues for their performances.

Another festival, the Military Tattoo, which had its origins in one bagpiper from the army appearing at the International Festival in 1947, was formally established in 1950 and performed in front of Edinburgh Castle with the future Queen Elizabeth, her sister Princess Margaret and their mother in attendance. A year later its performance was broadcast on the BBC. Benefiting from royal patronage and funding from the City Council and the British Arts Council, the Military Tattoo Festival and the International Festival were quickly perceived as high-status events that presented Edinburgh to the world as a cultural city.

A rather different festival, the Film Festival, also began in 1947. In comparison to the International and the Military Tattoo Festivals, however, it had to fight for acceptance. Film was not seen as an art form, but as a commercial product. It therefore had much lower status and thus had difficulties accessing its preferred venues. A former Director of the Film Festival spoke of the problems that she had experienced: "I was talking to… the Director of The International Festival. And a more arrogant man you cannot find…I remember saying to him 'Maybe could we have the Playhouse [Theatre] for a night?' [for a screening] and he just laughed at me." Such disdain and suspicion would go on to characterise relationships among many of the festivals for years to come.

As other festivals emerged – the Jazz Festival in 1978, the Book Festival in 1983, the Science and Storytelling Festivals in 1989, the Children's Festival in 1990 – so there was increasing competition for venues and fierce struggles over funding. The poor relationships among the festivals were exemplified by the reluctance to collaborate on venues, highlighted above, and also booking arrangements: "There would be talk about joint ticketing, for example. But to be

honest, that was never going to come to anything because nobody wanted to give away control of their own programme and their own system" (Fringe CEO).

The festival least affected by the shortage of venues and the competition for resources in the 1980s was the Fringe, which, because it had no stage designs or costumes, required less resources. Moreover, by 1985 the Fringe had over 500 groups performing (Dale, 1988) and had become by far the largest festival. As a former Vice Chair of the Fringe remembered: "It seemed as though if you wanted to be a comedian … you had to be in Edinburgh … stand-up comedy was becoming more and more popular." Those who used the Fringe as key stepping stones in their careers include Rowan Atkinson, Ian McKellen, Phoebe Waller-Bridge, Emma Thompson, and Stephen Fry.

The popularity of the Fringe, however, led to conflicts: "As the Fringe got bigger and bigger, suddenly the International Festival was not too happy" (a former Vice Chair, Fringe). A Fringe Administrator recalled how he was warned by his mother. 'Just you watch. The International Festival might steal your ideas.' And they did. They started to use smaller venues, for example, for theatre, and they invited companies, which had been successful in the Fringe, to do things in the International Festival and so on.

The tensions between the festivals became increasingly evident and relationships were described to us by a senior civil servant as "cut throat". The International Festival displayed "a certain amount of arrogance because it just regards itself as so supremely better than everybody else" (Senior Civil Servant). A former Film Festival Director admitted: "We were all…looking at each other with suspicion…we were very defensive. Very protective of our own stuff."

In 1998, the tension between the Fringe and the International Festival reached a crisis point. In order to differentiate itself, the leaders of the Fringe decided to start and finish a week earlier than the International Festival. One consequence was that during the last week of the International Festival, when the Fringe had finished, audiences significantly declined. As a senior member of the Edinburgh Council remembered, "There was no doubt that during the final week of the International Festival, for those years, the city was quieter. There was a drop off noticed by the restaurants, hospitality, trade and hotels." Hence: "There was a massive outcry … the International Festival … were absolutely furious." In boundary work terms, in other words, up to the mid-1990s, the Edinburgh Festival was characterised by festivals that competitively defended their jurisdictional and status boundaries, and the willingness to bridge those boundaries was minimal.

The City Council, very aware of the increasing competition from other countries bidding for major cultural and sporting events, feared that the changed dates of the Fringe Festival and the outrage that had been provoked would undermine its aspiration to be the world's leading festival city. Therefore, the Council decided to step in. To this point, the Council's role had primarily been to license festivals that wished to perform in Edinburgh, provide some funding, and make arrangements for venues, transportation and policing. In effect, the several festivals were simply given permission to perform during the month of August. Following the 1998 crisis, however, the Council established a formal organisation charged with pulling together the constituent festivals. The newly created Festival Organisation proved to be highly successful with Edinburgh quickly becoming the exemplary cultural city. So, what were the features and mechanisms of this new organisational form that had such a dramatic effect?

Building the Festival Organisation (1998 to 2023)

The Council reforms began with the setting up of a formal organisation, later named Festivals Edinburgh. The basic structure of the organisation was, and remains, non-hierarchical. From the beginning it had one layer of authority, the Committee of Festival Directors, composed of representatives from each of the eleven festivals and the Chair of the Governance Board. The Governance Board are neutral members of staff that have Festivals Edinburgh as their main interest. The festivals in turn chair the meetings of the Committee, and decisions have to be reached by consensus. Festivals Edinburgh has its own offices and six permanent staff; the constituent festivals also have permanent staff with the International Festival, for example, having 61 employees and the Fringe 39.

Referring to the Committee, the director of the Film Festival recalled: "it was the very first … formal coming together of the festivals with the City Council to develop at that time what was a kind of festivals' action plan, a festival strategy if you will." Until this point, none of the festivals had seen any point in including the other festivals in their planning. But, as several of our interviewees stated, the newly established Committee set the scene for willing collaboration whilst at the same time recognising and supporting the benefits from the festivals competing with one other.

The Council also set up Festivals Forum, a "high level strategic commission" charged with ensuring that Edinburgh "maintains its position as the pre-eminent Festival City" (former Chair of Festivals Forum). The Forum consists of senior representatives from important sectors – including the Director of the British Council (Scotland), the Chief Executive of Creative

Scotland, the Scottish Government's Director for Culture and Major Events, the Chief Executive of the Edinburgh Chamber of Commerce, the Chief Executive of the City of Edinburgh Council, and the Principal of the University of Edinburgh. Two features of the Forum are particularly worth noting. First, its members all hold powerful positions; second, the representatives connect the Edinburgh Festivals organisation to its wider institutional context. The Forum is thus an important 'voice' for collaboration. It meets two to four times each year and discusses issues that are presented to it, such as complaints from citizens about the increase in visitors to the City, and also reviews whether Festivals Edinburgh is meeting the longer-term goal of defining Edinburgh as the world's foremost cultural city. Any issues are raised with the Director of Edinburgh Festivals who then takes them to the Committee. Several features emerged from our data as key enablers of this structure: respect for jurisdictional boundaries; supportive status boundaries; temporal and geographical proximity; the festival's temporal rhythm; and socialisation and hiring practices. It is to these that we now turn.

Respect for Jurisdictional Boundaries. It was recognised by the City Council that the building of trust would be critical. Hence, an important initial step was the public acknowledgement that "all festivals are important to Edinburgh" (former Head of Edinburgh City Council) and that Edinburgh is a "festival city", not simply the host of one or two festivals. As a senior Scottish civil servant put it: "The festivals have to understand how they fit into the bigger picture and the responsibilities they have … what their role is, what their accountabilities are to each other and their interdependencies as well." Further, the Council made it clear that decisions were to be the outcome of open discussion between the festivals, and that consensual agreement was necessary.

At first, there were concerns that achieving these aspirations would be difficult: "My knees were shaking when I brought the festivals together for the first time" (former Director of Culture, Edinburgh City Council). Not all festivals were sure that their interests would be respected: "I was a sceptic at first but our interests *are* taken into account and listened to" (Director, Storytelling Festival). Particularly helpful in overcoming the early concerns was the inclusion of representatives from each of the festivals as members of the Edinburgh Festivals Committee, and, the sharing of the position of Chair of the Committee. We were told by a former Fringe CEO and founding member of Festivals Edinburgh that:

> The first chair was Joanna Baker from the International Festival and I was [also a] Chair from the Fringe Festival. And so part of the rotating Chair I think very much was that every Chair makes sure that one festival doesn't get a bigger voice than everybody else

> or for all the time…everybody needs to be brought into the conversation. You are always trying to make sure that all voices are heard and that you're building a consensus…You've got to have that kind of commitment.

This sharing of the duties of being Chair, moreover, encouraged the individual festivals to provide a "helicopter" perspective, as a former Fringe CEO pointed out:

> For the Chair role you need the kind of helicopter idea …to think outside your own festivals, which is what, as [Committee] members, of course, you're trying to do all the time, but because you are representing your own festival at the same time it is difficult. But when you're the Chair you really have to kind of button it from your own personal perspective.

Another festival director stressed that the move towards cooperation was reinforced by the requirement that decisions "could only go ahead if there was, you know, unanimous consensus about what they wanted to go forward on." Each festival has "a veto right [that] is quite a powerful thing." Admittedly, as one interviewee explained, "[t]his is not necessarily a fast method of working, but for the festivals it became a very sound method of working…. There is no point everybody…going off and doing their own wee thing and it not adding up". Moreover, "there has been an increase of honesty … people have been more willing to share their ideas and plans and to hear people's comments" (a Festival Director). As a long-standing member of the Committee explained:

> There would be a discussion and then we would come to a decision or I would go with their recommendation and say, 'I think for this reason and that reason we should maybe do that' and people would get behind it.

The inclusive membership of the meetings, the sharing of the duties of the chair, and the requirement that decisions should be agreed by all members, were critical for the building and sustaining of trust between the various festivals and for the lowering of boundary defensiveness. They provided reassurance not only that the jurisdictional boundaries of the constituent festivals were being respected, but that each festival was important. Our interviewees emphasised the continuing importance of this reassurance.

Moreover, as the festivals became reassured that their respective jurisdictions were recognised and respected, discussions turned towards how collaboration might be achieved. To help frame those discussions an outside consultant was hired to guide the way forward. As a former Edinburgh Council Director of Culture remembered: "What we did was, we agreed on the scope of that investigation and we brought in an independent consultant to help us with that. Somebody who was independently minded, not going to be biased." The first consultancy report, *Thundering Hooves Report*, began by highlighting that the reputation of Edinburgh as a

cultural city was helped by "the growth in the scale and number of Edinburgh's family of festivals." The number of festivals "has made the city a pre-eminent cultural destination over the six decades since the Edinburgh International Festival began" (p.4). But, the report stressed, the festivals needed to work more closely together because of:

> The burgeoning number of festivals, both in the United Kingdom and overseas, that are competing for artists, audiences and funding… [and the] increasing use of cultural programming [festivals and events] as strategic devices to promote tourism and to build the brand-identity of the cities or regions where they are located (p.3).

Therefore:

> In order to develop a lasting audience for the arts in Edinburgh, the Festivals should share data more routinely and assist one another in developing strategies…. Additional collaborative projects should be developed that focus on audience and educational development (pp.12-13).

The *Thundering Hooves Report* underlined that all the festivals are important. Thus, the push for collaboration detailed in the report was taken seriously, and the festivals began co-operating through Working Groups to address particular issues. A Director of the Book Festival told us:

> What I would say is that … we're all equal and you know, work collectively in terms of our actual work from trying to think in terms of other festivals…So being part of the [Committee] meetings and the Working Groups helps us to see each other regularly and find opportunities of collaboration.

At first, collaborations were relatively pragmatic, such as developing a shared booking system, providing a timetable of marketing campaigns that would avoid festivals clashing on dates, rethinking the location of toilets, and the issue of visa requirements for performers. One year, for example, a festival was facing a crisis from the lack of tents for its shows so another festival quickly stepped in to provide support because the two festival members had got to know each other: "It was just really awesome to have that neighbourly sense between the venues, because somehow usually I would feel … like you must be competitive in those environments, but they were really helpful to us" (Fringe Venue Manager). Contrast this with the data presented earlier documenting the intense competition, dislike, and disdain that characterised relationships among staff from different festivals prior to the formation of the Festival Organisation.

Later, issues of a more strategic nature were addressed, such as how to meet the Council's net zero carbon climate policy target, how to respond to increasing international competition, and how the festivals could work with Edinburgh's schools, theatres and other cultural organisations. In 2021 the implications of Brexit were analysed:

> The International Festival and the Fringe …had visa teams that looked into changes through Brexit. We do not have this. But because we were part of *Festivals Edinburgh* and the Working Group, we could see what other festivals are doing and how they are dealing with the situation. This was helpful for us (Manager, Storytelling Festival).

We were repeatedly informed by our interviewees that the increased collaboration is underpinned by the trust that has been established during meetings of the Committee and its Working Groups. As a Council representative put it, from the very beginning "the fabric of the extant festivals and the nature of those festivals began to shift. So, there was a dialogue between the festival directors and the officials like me and my boss." Further, "there has been an increase of honesty … people have been more willing to share their ideas and plans and to hear people's comments" (Festival Director). As a Head of Culture would later say, with evident pride, the relationship between the festivals has "evolved into a model of interagency collaboration." Collaboration was also helped by the "fairly light touch" of the Council (Councilor). Defending the jurisdictional boundaries of the festivals, which had characterised the earlier decades, was no longer the dominant motivation. Instead, collaboration had become a priority.

Supportive Status Boundaries. The successful push for collaboration was enabled by the removal of the earlier status distance between the festivals. Partly, this change arose from the retirement of some of the early leaders and the arrival of directors who enjoyed each other's shows. But the Fringe was also becoming associated with nationally acclaimed comedians and receiving media publicity as an elite expression of its art form (Pollock, 2022) Moreover, as one Director of the Film Festival wryly explained: "Tourists and even citizens think the Fringe is *the* festival."

Status boundaries, however, still played an important role but in a very different way to that of earlier decades. Instead of the constituent festivals looking at each other with disrespect, each of the eleven festivals now see and admire the others as elite in their particular cultural jurisdictions. The Fringe Festival director, for example, emphasised his pride in being "part of the fantastic spectrum of festivals." Similarly, the Director of the Military Tattoo declared the accomplishments of the International Festival as "just brilliant." Another festival director stated: "Probably the greatest most consistent thing across all the festivals is the high, high quality of the work. In every single festival, and I think that's really important …every festival has its own international reputation". A former Director of the International Festival confirmed the shared admiration of the constituent festivals:

> I also felt…coming from, if you like, one of the big festivals, the International Festival, it was important for the International Festival to recognise, and to be seen to be publicly

> recognising, that it was the wide range of festivals that made the city special. This is what makes us a unique thing in the world, particularly in August, this combination of events.

The festivals, in other words, regard each other as being of similar status – internationally excellent – and, they interpret their collective high status as the basis for Edinburgh's claim to be "unparalleled as a festival city" (British Council, 2022). In a recent presentation to the Scottish Parliament the eleven festivals referred to themselves as "the Edinburgh *family* of festivals" (Scottish Affairs Committee, 2023).

The shared identity of an internationally acknowledged elite cultural event has two important consequences. One is that it motivates all of the festivals to keep improving in order to show that they deserve that status. We discuss this further when we relate the notion of inspirational competition. The second consequence is that an overarching boundary pulls the constituent festivals together and encourages them to help each other. Initially, the collaboration focused upon how the constituent festivals might benefit from working together in their requests for sponsorship and funding. As the Director of the Book Festival explained, "speaking with one voice made it easier for the government as well as for other funding bodies to talk to us and to gain higher amounts of funding." Similarly, a founding member of Festivals Edinburgh told us that, "allowing the festivals to speak with one voice meant that concerns of funders could be addressed and more formal applications for funding could be achieved."

The Director of the Tattoo Festival pointed out that Festivals Edinburgh "represents a critical mass. A critical mass is advantageous because people travel the world and come because they know that there will be eleven different festivals." Furthermore, Festivals Edinburgh is "a brand in stark contrast to its international competition." The Director of Festivals Adelaide, for example, confirmed that the strong identification of the constituent festival directors with the ideal of Edinburgh as the Festival City contrasts with other cities in which individual festivals often spend more energy competing with each other than focusing on their overall success.

Geographical and Temporal Proximity. It became evident as we analysed our data that the combination of the geographical and temporal proximity of the various festivals has an interesting effect upon how the festivals think of competition. Edinburgh, as several of our interviewees wryly pointed out, is "a distinctive old town with small alleys and lots of little theatres, pubs and churches that are used for the festivals. In addition, the city is very walkable" (Art Consultant). This close proximity helps the festivals see, learn, and share how other festivals are gaining audience acclamation and how their own performances might improve. A member of the Storytelling Festival recounted the benefits of observing others: "My colleague

… is very often making a comparison and assessment, 'Oh, the Book Festival are doing this and that…so we can do the same or maybe we can explore this aspect, or the Fringe are doing this.'"

Geographical and temporal proximity also supports co-operative social relationships that reinforce the learning and motivation. As a Director of the International Festival explained, "there is a social network of people from all of the different festivals that go out drinking, socialising and all of that." In similar vein, a Fringe Director observed that "when new people come in, they often kind of report that it feels like they are joining a family of organisations and festivals, because we do all look out for each other." Some of the festivals provide free tickets to other festivals' employees to watch dress rehearsals, providing, again, opportunities to learn and admire. We were told by several of our interviewees from the smaller festivals how they learned from the larger festivals:

People are used to being able to buy a ticket easily and being met by front-of-house staff who wear a uniform and are trained and all that sort of stuff. The bar is set quite high. So that's great. It means you've someone to learn from. You've got a standard to aspire to, and I think that inevitably drives up the quality (Science Festival Director, emphasis added).

The larger festivals also learn from the smaller festivals, who often have more creative leeway in exploring and trying out new concepts in front of smaller audiences. These "new approaches to shows and performers" are then absorbed by the larger festivals during discussions within the Working Groups (Manager, Storytelling Festival). The combination of geographical and temporal proximity, in other words, helps the festivals observe and learn from each other. One art consultant and former festival director compared his experiences with other cities whose more dispersed layout did not capture the Edinburgh "buzz". As he put it: "Edinburgh is a village; everyone knows everyone". Similarly, in the words of another festival director:

> I think what I've realised over the years is that the topography and geography of a city are really important. It needs to feel like a city where everything is close. It has to be a walking city and it has to be a city which is nice to be in even in between the events…people sitting around in a café walking in the street feeling they are part of the festival.

This was reinforced by a former CEO of the Fringe Festival:

> Unlike London for example, even if it's a small festival, it's a small collegiate place where you will meet your colleagues and you will be attending other festivals, you will see the festivals in real life and so will the politicians and the people from the [Edinburgh] Forum. Everybody has no place to hide. The upside of that, you know, is that there's physical proximity that makes collaboration easier and education easier and so on.

More significantly, however, in addition to supporting the benefit of learning across the festivals, geographical and temporal proximity enables and generates a novel form of competition. In previous decades, the acts of competition were clearly dysfunctional and centered upon advancing the interests of a given festival. However, when asked about relationships between the festivals, one interviewee downplayed the notion of competition:

> We are trying to be the best so that audiences will love us – but I wouldn't characterise it as healthy competition. More just a general commitment to excellence and quality…. We are trying to be the best so that audiences will love us, not how we can put the other festivals out of business (Director, Book Festival).

Competition, for this Director, implied adverse consequences for other festivals, hence the term was to be avoided. By contrast, the Science Festival Director, when asked whether the festivals were in competition with each other, excitedly answered: "Yes! Always! I'm inspired by the festivals and also by the other individuals who sit on the [Committee] of Festivals Edinburgh!" Similarly, the director of one of the smaller festivals noted that: "Within Festivals Edinburgh there are these big players and we are a part of it. We get inspired by them and we strive for a certain level of quality" (Science Festival Director, emphasis added). The 'big players' are also motivated to excel: "I think that a festival's role [in Edinburgh] certainly is to always try and present something that's different and new, because otherwise why are you different from your repertory theatre down the road?" (Director, International Festival).

This framing of 'competition' as 'inspiring', in contrast to the zero-sum framing of the earlier decades, was prevalent in our interviews. This does not mean that a sense of competition was missing; rather, it means that the competitive drive is constructively contained:

> The festivals are competitive. Course they are. As I said, you know, all this urge to be told that you're the best, that's a competitive urge to be regarded as a winning festival…. People are embarrassed that they are competitive and they want to be perceived as kind and collaborative. And these are the kinds of values that we have…. Because we do not really want other people to be losers. But we want to be winners. We all want to be winners. But with us being the biggest winners (Book Festival Manager).

Temporal Rhythm. Meetings of the Committee of Festivals Edinburgh and of its working parties are held throughout the year except for the show month of August. An unexpected advantage of this unusual 'temporal rhythm', as several of our interviewees pointed out, is that the concentration of performances in August results in space across the rest of the year for meetings. The frenetic bustle during August followed by calmer months makes collaboration much easier to achieve because the Committee and the Working Groups are able to focus upon broader issues without distraction. As the Director of the International Festival told us, during

the summer months “we work 18-hour days which is not sustainable. In the long run we need to have periods where we can rejuvenate.”

During the month of August, in other words, there is little desire for formal meetings. No-one has the time nor the inclination to think of longer-term issues. In the words of the Book Festival Director: “Festivals Edinburgh asks around usually in the beginning of the year when we can meet to set the dates for the new calendar year. While the festivals are on, it is busy and really everyone focuses on getting their festival.” In contrast, during the calmer reflective periods, meetings are more casual and provide the opportunity to discuss more long-term issues. One festival director told us that during these quieter months he and another festival director have bi-weekly conversations where they discuss how their festivals can collaborate over the next year. More formally, meetings raise and dig into strategic issues that have arisen and need attention. The key point is that the hyper-active month of August ignites ‘inspirational’ competition, whereas the much more relaxed months that follow enable collaborative reflection. It is during these calmer months that joint strategic initiatives emerge, as a Jazz Festival Director explained:

> What Festivals Edinburgh does is put us all into the room. We have a collective agreement about what the global picture is…there is also an element of collective lobbying as well on certain issues. It's much better to do it collectively and I think some of the festivals have stepped back from areas of lobbying and let Festivals Edinburgh kind of do it.

It is during these calmer months of the year that members of the Forum touch base with those running Festivals Edinburgh to discuss any issues or challenges that are being experienced by the festivals. Sometimes, individual festivals are invited to attend the Forum for particular issues. Issues considered in 2021 included diversity and inclusion, pressures on costs, income and workforce, and climate change. An official at the Festivals Forum noted:

> Given the Forum is not a formally constituted body, but rather one that helps to build collaborative effort and relationships and develop a shared strategic direction, many interactions are informal … So, outside of Forum meetings, we have from time-to-time organised other types of gatherings of stakeholders and Festivals, e.g., larger conference type events, roundtables and informal/social gatherings and briefings.

Socialisation and Hiring Practices. One means by which the culture of collaboration and competition is helped is that the majority of festival directors have been in their roles for several years. The turnover of directors is very modest. Three of the eleven festival directors have been in their current roles for over two decades, and another five for almost a decade. Second, when positions do become open, the tendency now is to look for successors in the immediate

institutional setting. As a senior City Council member told us, "I think within about three weeks of my announcing [that] I was going to be leaving the Council, a festival approached me and asked: 'Would you consider being our chair?' I did not hesitate for very long [before saying yes]." Another festival director reported, "I worked for the Fringe Festival and then I worked for the Book Festival, the Edinburgh Book Fair as it was then." By moving personnel between the festivals, the culture of 'family cooperation' is both diffused and reinforced.

A third way that culture is strengthened is the lending of employees to other festivals. For example:

> I worked for the Film Festival…. Later, in the late '80s, I think it was the Jazz and Blues Festival asked us to come in…as they had gotten into a serious financial mess…. Because I've been involved for such a long time, I've done every job [so I was able to help them] (Jazz Festival Director).

The City Council and the Forum are very sensitive to promoting Edinburgh as a leading festival city. Therefore, the Forum consistently nudges and reminds Festivals Edinburgh of the need to recruit carefully: "As a funder, you want to say…[we] want to see somebody who is a collaborator, who understands the interdependencies and who understands the uncertainties of the future and how we need to work together for this cultural strategy to work" (Civil Servant). Moreover, in its meetings members of the Forum raise and discuss issues that advance Edinburgh's reputation and by doing so pull the constituent festivals into that larger conversation, and, implicitly remind them of the purpose of collaboration. Table 5.3 provides additional proof quotes about the characteristics of the Festival Organisation.

Table 5.3. Characteristics of the Festival Organisation

Emergent Theme	Characteristic Elements	Representative Data
Organisational Structure	An overarching boundary	"The variety of events; and the number of participants, permanent and temporary staff, combine to give 'the Festivals' a specific role in the Scotland-wide cultural and events ecosystems. Talent, ambition, skills, jobs, ideas and inspiration circulate through the system, boosted by the Festivals. This research highlights that being the home of these large-scale, internationally renowned events benefits all Scottish cultural and event organisations. This is reflected by the prominent role the Festivals play in national strategies, including The Perfect Stage (Scotland's Event Strategy)." (Edinburgh Festivals – The Network Effect, p. 2) Not every festival needs to do everything and there is a role for Festivals Edinburgh to co-ordinate activity - using existing structures to make connections across the city and beyond, working in partnership with other year-round cultural organisations in the city." (Thundering Hooves 2.0, 2015: 7) "For the number and range of large festivals, Edinburgh's festival season in August is unrivalled in the world. In terms

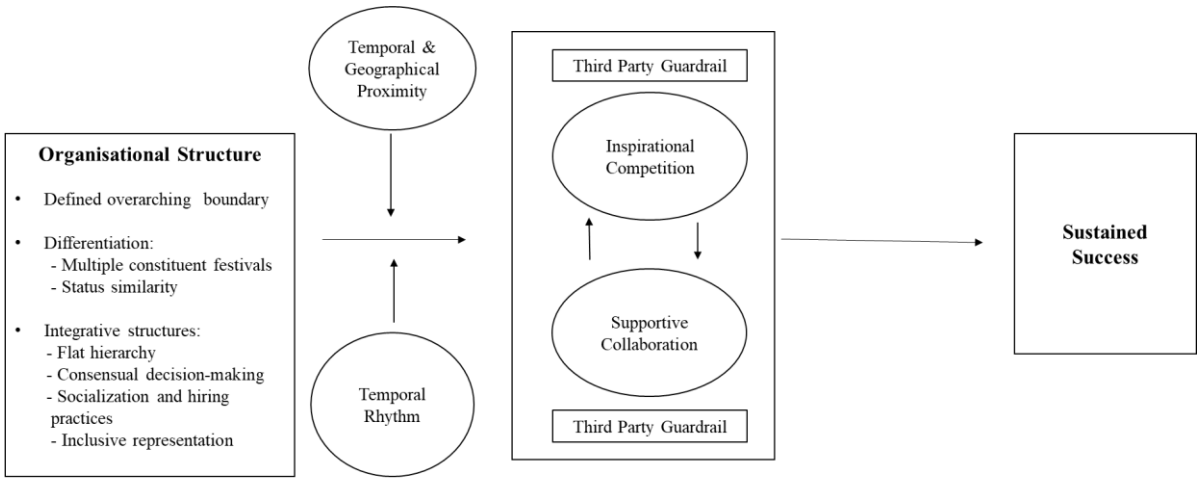
		of festival days per year (calculated by adding the length in days for each festival found in each city), Edinburgh's offer is not exceptional…or the number and range of large festivals, Edinburgh's festival season in August is not rivalled by the benchmark cities. In that month Edinburgh is 'the Festival City'." (Thundering Hooves Report, 2006: 30-31)
	Status similarity	"All of the Edinburgh Festivals have a very high standard." (Adelaide Festival Director) "What fascinates me about the Edinburgh Festival for 20 years is how they set the world standard for cultural art festivals." (Art Consultant) "No festival is more important than another" (Festivals Edinburgh)
	Flat hierarchies	"We can just call each other and ask if we have questions or need help for something we do not have to send an email first. This is all way more informal." (Manager at the Book Festival)
	Consensual decision making	"We, as the [Committee] of Festivals Edinburgh, make sure that the interests of all of our members are represented in an equal manner." (Festivals Edinburgh Director) "Collective Strategy of the Edinburgh Festivals, celebrating together" (2030 Vision for Edinburgh Festival City, p.12)
	Socialisation and hiring practices for inclusive representation	"We hire collaborators." (Councilor) "Through the Working Groups someone always knows someone at another festival." (Book Festival Manager) "People move between organisations. My boss just recently relocated to the city council." (Manager at Creative Scotland)
Sustained Success	The Festival Organisation is characterised by long-term success	"Success depends on achieving and sustaining a consistent international quality threshold for all festivals in order to ensure that the brand value of the festivals is sustained." (Thundering Hooves Report, 2006: 9) "'It means that there's a good vibrant, flexible economy out there – and there's a lot of crossing of boundaries and innovation, as there should be.' (Cultural organisation)." (Edinburgh Festivals – The Network Effect, p. 18)
Inspirational Competition	Competition is not understood as something negative but as inspiring, pushing each other to be as strong as they can be. The festivals learn and appreciate each other and create an environment in which they can grow.	"…competing against other festivals with very high standards helps us to be world-class" (Science Festival Director) "Celebrating the diversity of the Festivals and harnessing their combined power to enhance Scotland's reputation as a creative nation, this support has generated remarkable new opportunities for Scotland's artists and companies. For the Festivals themselves this has been transformative, helping to significantly extend their own creative possibilities, deepen their innovative capacity and enhance their international reputations." (Ten Years of Expo Fund Report, 2018: 29) "The inspiration, innovation and international networking that the Festivals provide for creative talent is also vital to the ongoing health of Scotland's creative sector and the cultural sector in which it operates." (Edinburgh Festivals – The Network Effect, p. 18) "We need to make sure that our program showcases the excellence of our festival. Scotland is very small we all apply with to the same philanthropists for funding." (Member Book Festival)

Temporal Proximity	The majority of festivals take place over the summer months	"Sometimes we cross promote between the festivals. [For example] There might be something showcased on one of the festivals in spring and then there is a connected version showing at the Fringe in August." (Science Festival Director) "People might spend six months with one festival [organisation] and six months with another festival [organisation] in preparing the festival…providing a good pool of people" (Science Festival Director)
Geographical Proximity	Edinburgh is a small, walkable city. Employees and other stakeholders of the festivals know each other and watch each other's shows.	"Edinburgh is a village but the pool of festival and cultural management people in Edinburgh is similar to way bigger cultural cities like New York or London… [and people] can move between organisations." (Art Festival Founder) "The city's history, architecture, topography and scale make the city itself a participant in the Festival experience for everyone who attends." (Thundering Hooves 2.0, 2015: 4)
Temporal Rhythm	The Festival Organisation supports the festivals in structuring the year in reflective time periods (what can we learn and improve?)	"We use our Christmas lunch to reflect and to talk to each other and check in. Other festivals have reached out to me asking how we are doing in the current situation." (Manager Book Festival) "For our EPOG [security- and infrastructure] to be planned wisely and to adapt to new challenges we need to reflect on the learnings of each festival and right after August start to plan and develop the EPOG structure for next year." (Councilor)
	Operational time periods (my light technicians cannot solve this problem who can?)	"During the festival there are 18 hour days, we make things work. This is not a long-term solution but it helps us to get things done. We need to make sure that people can recover after the festival and reflect and then come back ready to plan the next festival." (Book Festival Director) "It is difficult to give example because it happens so fast [during the Festival] but because staff members know each other from the Working Groups if they face a problem let's say with the ticketing or the lightening, they know whom to call from another festival to help them out." (Children's Festival Manager)
Supportive Collaboration	The Festival Organisation works together on challenges that all of its members face and make sure that all of their members are well supported.	We collaborate on solving problems that are jointly held." (Science Festival Director) "The partnership structures and working, between the festivals, Festivals Edinburgh (FE), the Thundering Hooves Steering Group (THSG) and the Festivals Forum, has been very successful. The collective trust developed has ensured the successful development of Edinburgh's festivals over a challenging period." (Thundering Hooves 2.0, 2015: 17) "Francesca Hegyi, the chief executive of Edinburgh International Festival, said she hoped to see the return of the film festival. 'During this difficult time, and while film festival staff consider their options, we have offered them space within our building, and we stand ready to help where we can', Hegyi said." (The Times 04/11/2022) "The Fringe, we used their box office" (Science Festival Director)

Discussion

We began our study motivated to understand an increasingly used but little understood organisational form. Our primary theoretical contributions constitute the defining design features of a Festival Organisation, and the mechanisms that underpin how this design is constituted to allow optimal competition and collaboration across its component parts. The structures and associated mechanisms of the Festival Organisational form are summarised in Figure 5.1. Our secondary contributions inform boundary work theory.

Figure 5.1. Theoretical Model of the Festival Organisation



The Festival Organisational Form

The basic structure of the Festival Organisation consists of several constituent festivals of similar status - in Lawrence and Lorsch's (1967) terms, there is low differentiation - complemented by the integrative devices of a flat hierarchy, inclusive representation, and consensual decision-making. These structural arrangements address two distinctive challenges: they encourage constituent festivals to compete for venues, sponsorship, policing and so on, in order to attract performers, because only by attracting performers will a festival attract an audience; and, they secure collaboration across the boundaries of the festivals in order to gain both strategic and pragmatic benefits. Thus. competition and collaboration are central to achieving high levels of performance.

But there is a third performance requirement: namely, *sustaining* the balance between the push for competition and the pull for collaboration. As observed in other forms of organisation, balancing often conflicting competing prescriptions is not easy (Ebrahim, Battilana, & Mair, 2014; Ometto et. al., 2019; Dunn & Jones, 2010). As Cappallero, Compagni and Vaara (2020)

show, imbalance can follow from the sheer hubris of actors advocating different perspectives. Gray, Purdy and Ansari (2022: 2) further suggest that "collaborative partnerships often devolve into contentious negotiations" because of underlying power differences. Not surprisingly, therefore, as Grimes, Williams and Zhao (2020) conclude, securing balance between competing goals and norms is an increasing strategic challenge (see also Smith & Besharov, 2019). Our case is thus interesting because it identifies how a balance between competition and collaboration can be achieved *and* sustained. In presenting our analysis we discuss each of the three performance requirements in turn – competition, collaboration, and the sustaining of balance.

Generating Competition. In one sense, competition between constituent festivals is to be expected as they seek to attract spillover audiences who move between the various festivals. A competitive synergy arises simply from being located at the same time in the same geographical space, for a restricted duration. The combination of geographical and temporal proximity, and a temporal rhythm that compresses that proximity, in other words, stimulates competition.

The influence of geography upon competition has been observed in studies of other organisational forms (for reviews see Almandoz, Marquis, & Cheely, 2017; Wright, Irving, Zafar, & Reay, 2022; Stephenson et. al., 2020). Greenwood et al. (2010) for example show how Spanish organisations responded differently to market pressures depending on the cultural norms of the region in which they are located. Marquis and colleagues (2007) highlight the importance of community networks upon the adoption or rejection of corporate social responsibility. Similarly, Lounsbury (2007) traces how different logics become embedded and insulated in particular cities. Greve and Taylor (2000) report how geographical proximity affects how organisations learn of, and respond to, innovations of other firms.

Geographical location, in other words, is known to matter. However, the influence of geography upon a Festival Organisation is distinctive in two ways. First, it involves the *combination* of geography and time; and, second, both geography and time are *compressed* That is, the constituent festivals are in the same place at the same time but the space is limited and crowded, and the duration is brief rather than extended. Being in the same place at the same time for a limited duration means that the various festivals are constantly seeing each other *and* their audiences, and are galvanised by the emotional energy of the busy weeks of performing. An important implication is that these circumstances stimulate festivals to strive to be as successful as other festivals; and, provide ways of learning by observation of how to do so. The placing of

festivals in the same geographical and temporal space, in other words, stimulates the benefits of competition because people see and hear and learn, and can become excited by, other festivals.

The insight that geographical and temporal proximity contribute to the benefits of competition is significant but our findings also reveal a very different form of competition – *inspirational competition.* The term 'competition' typically describes two or more entities seeking to win a zero-sum pursuit of limited resources (Swab & Johnson, 2019). Such competition figures prominently in studies of "how people defend, contest, and create boundaries … to achieve some kind of advantage" (Langley et al., 2019: 5). In effect, the consistent message of competitive boundary work is of "resource competition" in which one party wins and the other does not.

In contrast to resource competition, inspirational competition not only can see all parties being successful, but, in doing so, it acts to motivate constituent festivals to seek ways by which they can individually improve. In this way, inspirational competition contributes to the overall success of a Festival Organisation. But also, as we elaborate below, it can paradoxically encourage collaboration between the constituent festivals. Before turning to collaboration, however, we stress two things. First, the success of a Festival Organisation is enhanced if the constituent festivals compete with each other not in a zero-sum resource competition manner but in an inspirational way. Second, it is the combination of geographical and temporal proximity combined with the unusual temporal rhythm (i.e., performances compressed into a limited number of weeks followed by lengthy periods of non-performance) that actively enables and precipitates this form of competition. As our case shows, during the excitement of August the various constituent festivals witness other festivals being acclaimed and learn how they themselves might adapt and improve. Observing the successes of other festivals does not depress those involved; on the contrary, their successes are motivating.

Our work raises interesting questions for boundary work theory, a literature in which the effects of geography have received little consideration (Langley et al., 2019). It would be interesting, for example, to observe where and how inspirational competition occurs, and its consequences. One setting might be universities, whose faculties could be inspired by each other's performances. Similarly, professional service firms such as law and accounting typically consist of geographically dispersed offices. Do these organisations engage in inspirational competition? If not, why not? A third context, hospitals, might have two places where

inspirational competition can be found: between hospitals in geographical proximity; and, between professions within the same hospital. Another context might be political parties within a democratic institution. Do they view each other as competitors but also as members of a common institutional arena that prescribes a measure of collaboration? Further, how resilient is inspirational competition in these settings?

A related line of questioning could examine *how* inspirational competition can be enhanced. Do, for example, field-configuring events such as conferences, tournaments and celebrations play an emotionally amplifying role? Or, do they undermine it? The significance of field-configuring events upon processes of institutional change has long been recognised, but exploring their role in generating inspirational competition and collaboration could be insightful. Academic conferences, for example, are intended as vehicles of inspirational competition, yet tenure requirements that demand publications in elite journals might undermine the collaboration that is an intended purpose of sharing knowledge at conferences. Exploring this paradox would be interesting.

A rather different line of research could explore situations where inspirational competition is paramount but where some actors are unable to reach their aspirations, or, over time, experience a lowering of performance. Do such circumstances lead to a greater willingness to bridge boundaries by collaborating with weaker actors to help them recover and improve? Or might it lead to shaming and the collapse of collaboration? Finally, it would be informative to explore contexts where inspirational competition may have dysfunctional consequences, such as the judiciary system where impartial and measured reflection is prioritised. Uncovering the places and implications of inspirational competition should open new lines of theoretical development of boundary work.

Achieving Collaboration. If competition between the component parts of a Festival Organisation is to be expected, collaboration is much less likely. As one of our interviewees succinctly put it, Festival Organisations require "people who are kind of instinctively competitive to also be collegial. It can be tricky" (former Director, Arts Festival). So, how is the bridging of boundaries accomplished? The starting point is the 'flat' basic structure and the consensual discussions and decision-making that resonate with Gray et al.'s (2022: 8) observation that collaboration is more likely "when stakeholders with relatively similar levels of power begin to identify shared goals", and with Adler and Heckscher's (2018) principle of 'participative centralisation'. As Slade Shantz et. al. (2020: 521) concluded in their study of

cooperatives in Ghana, "flat structures can engender a sense of shared responsibility and freedom, increasing commitment to the groups' outcomes and facilitating cooperative behaviour". Similarly, Mitzinneck and Besharov's (2019) study of German renewable energy cooperatives identified the benefits of "democratically creating consensus." A common point in each of these studies is that they study homogeneous groups of actors. We extend the research on flat structures and consensual decision making by showing how an organisation with heterogeneous actors can maintain a flat organisational structure and continue to make decisions through consensus, but at the same time cultivate a constructive and collaborative atmosphere. Tensions are not just overcome but used to achieve a balanced communication between heterogeneous organisational members. The bridging of organisational boundaries the leads to an increase in commitment to the group.

The Festival Organisation has two other factors that enable collaboration: its temporal rhythm, and its status boundaries. The temporal rhythm makes collaboration easier by removing the pressures of urgent and demanding distractions. The temporal compression of intense activity means that, thereafter, there is considerable time to discuss and negotiate issues of general concern. The separation between, on the one hand, the "swirling yet highly organised chaos of the festival atmosphere" (Toraldo & Islam, 2019: 310); and, on the other, the reflective calm that follows, provides "spaces" (Kellogg, 2009; Battilana et. al., 2015) or, in Haug's terms (2013), "meeting arenas" in which reflective negotiations can take place. The temporal rhythm is thus highly significant. However, by itself the provision of spaces may be insufficient to trigger constructive discussions. It is one thing to have a space, it is another thing to actually be willing to use it. This requires status similarity. The importance of status runs through studies of competitive boundary work (for reviews see Pollock, Lashley, Rindova, & Han, 2021; Piazza & Castellucci, 2014). A typical pattern is of high-status organisations and professions placing disdainful boundaries around those of lower status, and behaving dismissively towards them (e.g., Reay & Hinings, 2005; Delmestri & Greenwood, 2016; McPherson, Smith-Lovin, & Cook, 2001). An interesting example is Dacin, Munir and Tracey's (2010) account of elite professional firms in the UK privileging recruits from the universities of Oxford and Cambridge. Similarly, Smets, Morris and Greenwood (2012) trace elite law firms in the UK preferring German law firms of similar status. Status differences, in other words, work against collaboration. For a Festival Organisation to be successful the hurdle of status disdain has to be overcome, which suggests that status differentiation should be minimised. But, again, although

status similarity is required to make collaborative discussions possible, it is by itself insufficient.

The use of collaborative discussion spaces, we propose, requires a second aspect of status that has received little attention in the literature. That is, an *overarching status boundary* can amplify the willingness of insiders to collaborate by portraying outsiders as competitors. In effect, such a boundary furthers an "affiliation-based community" (Almondoz et al., 2017: 194) that pulls constituent festivals together. Moreover, by pulling the festivals together, negotiation spaces are more likely to be used. In this way, the temporal rhythm and status similarity create the spaces, but it is the overarching boundary that motivates their use.

The insights above usefully extend boundary work theory. It is known, for example, that bridging between low and high-status organisations is extremely difficult (Kaplan, Milde & Cowan, 2017). Status differences, such as those between doctors and nurses, usually lead to competitive boundary work (Comeau-Vallée & Langley, 2019). Moreover, as Piezunka et al., (2018) and Lefsrud and Meyer (2012) note, status boundaries at the organisational level usually prompt competition between organisations. Our case, however, shows that the influence of status on boundaries is more complicated than it is often presented. On the one hand, collaboration between organisations is more possible if status differences are low and/or downplayed, and if jurisdictional boundaries are openly respected. Moreover, collaboration can be enhanced if an overarching status boundary separates one cluster of organisations or occupations from others. Status boundaries that are clearly accepted and respected by all organisations can provide reassurance for the individual organisation and in doing so encourage them to share best practices without the fear of giving away their strength. Weber, Kortkamp, Manner and Humer (2022: 2), for example, linked the "efforts of professional groups and their members to influence the boundary between professions" with social status serving as a vehicle of power. We show, in contrast, that social status can be used not to defend boundaries separating organisations or professions, but to bridge such boundaries.

The significance of the pulling together of the constituent festivals in Festivals Edinburgh is highlighted by the contrast between our case and Knight and Pye's (2005) observation that larger organisations within a collaborative network often push their own priorities. The Fringe Festival, despite being substantially larger than the other constituent festivals, does not behave in this manner because of the overarching boundary that defines the festival "family." However, we would go further and suggest that collaboration in a Festival Organisation is also helped by

the energising momentum of inspirational competition. That is, inspirational competition activates collaboration if, as in our case, it is associated with growing international acclaim. Collaboration and inspirational competition, in short, reinforce each other.

More research is needed to advance our theoretical understanding of how collaboration is supported in the Festival Organisational form. In particular, the influence of status warrants inquiry. In our case, the move from status distance to status similarity was achieved by the success of the Fringe festival, which undermined the disdain initially expressed by members of the International and Military Tattoo festivals. What we do not know is how, or even if, constituent festivals could be persuaded to collaborate if there is a measure of status difference between them. Could an overarching boundary countervail the adverse implications of status differences? Or are both status mechanisms required? We also need more analysis of the intriguing influence of inspirational competition upon the motivation to collaborate. If a Festival Organisation receives only modest public acclaim, would that undermine the drive for inspirational competition and weaken the willingness of its constituent festivals to collaborate despite the advantages of its temporal rhythm?

Sustaining Balance. Balancing inspirational competition and motivated collaboration, as noted above, is not easy, especially over the longer term. While there have been some recorded examples of competitive and collaborative behaviours occurring in close proximity (Pache, Battilana & Spencer, 2023; Gümüşay, Smets, & Morris, 2020; Smets, Jarzabkowski, Burke, & Spee, 2015), but these are uncommon and less understood than failures (Battilana, Besharov & Mitzinnek, 2017). So, what features of the Festival Organisation countervail the risk of losing balance?

First, it is apparent that the establishing of "meeting arenas" (Haug, 2013:707) provide opportunities for the "negotiation of an acceptable balance" (Ometto, et. al., 2019: 1004; see also, Battilana et al., 2015). Examples of such arenas are the "listening posts" that bridge the "respected spaces" of refugee camps (de la Chaux et al., 2018). Our case confirms the influence of such arenas. The several meetings that were held outside of August brought the various parties together and provided the space and time for balanced reflection and discussion. However, an important qualification for their use in a Festival Organisation is that they may be undermined if there is a high turnover of personnel. Retention of employees can be a significant influence upon the working of meeting arenas because those within an organisation who are familiar with, and committed to, the prevailing norm of collaboration can help newcomers

become familiar with their importance. Further, they countervail the natural tendency for newcomers to seek to show their influence upon the performance of the hiring festival. Given the emotive drive of inspirational competition, having colleagues who appreciate and display the importance of collaboration is an important counter to the risk of imbalance that might come from new employees.

The second insight into how imbalance is avoided is through the creation of quite specific "guardrails" (Smith & Besharov, 2019). Guardrails make trends towards imbalance more visible and hence increase the possibility of taking appropriate corrective actions. This notion of guardrails is attracting scholarly attention but requires empirical elaboration (Pache et al., 2023). Our work extends theory by developing two previously unreported insights that are particularly relevant for the Festival Organisation form, and likely have broader resonance. First, the presence of a quiet outsider not caught up in the frenetic activities of delivering the product, and second, the temporal rhythm that prevents the destructive time pressure observed by Ometto et al. (2019).

In our case, the quiet outsider role is played by the Edinburgh Forum, whose members, as one councillor put it, were able "to keep the big picture in mind." This ability was helped by the simple fact that the outsider was not a member of the festivals, hence our use of the term third party. Moreover, the members of the governing and advisory boards included members of the institutional context, notably, the City of Edinburgh and Scotland which, as Ometto et al. (2019) suggest, is important because connecting with the outside context helps organisations step back and reflect. Our observations of the Edinburgh Festival take this insight further in two ways. First, we note that the mediator is more likely to see wanderings if s/he is particularly connected to the performance outcome that is more likely to be sacrificed and that historically was the least practiced. Second, 'outsider' intermediaries that have, but do not exploit, authority over important resources, are perceived as not only having discursive legitimacy (Phillips, Lawrence, & Hardy, 2004) but also as deserving of respect and acceptance. Moreover, as noted earlier, having a lighter touch enhances the willingness of others to listen and contribute.

We see this notion of a quiet third-party guard rail as an important yet previously unreported counter to the risk of imbalance that connects the guard rail concept to a key feature of the Festival Organisational form, the influence of its temporal rhythm. Festivals take place during a specific time period, followed by lengthy periods of non-performance. During the frenetic performance period the pressure is to deal with day-to-day issues and problems that might

unexpectedly arise. The emphasis is upon inspirational competition. There is no time for collaborative reflection. But once the frenetic period is over the following lengthy periods are available for reflection. There is, in other words, a separation between, on the one hand, the buzz and energy of showtime and, on the other, periods of reflective calm. We see this notion of calm reflection provided by temporal compression as an important and previously unreported structural counter to the risk of imbalance.

In the Edinburgh case. formal meetings are held throughout the year, and this regularity of meeting arenas/herding spaces takes advantage of the Festival Organisational form. As noted above, attendance at these meetings is not questioned by the constituent festivals because of the involvement of the third-party outsiders who, as we noted, have discursive legitimacy. Further research is needed to uncover more fully the features that might sustain or undermine the gentle role of such third-party outsiders. If Festival Organisations spread their constituent festivals throughout the year, does this weaken the influence of third-party outsiders by restricting the benefit of time-based meeting arenas? A rather different research direction that might be informative is the influence of history. It was very evident in our case that the constituent festivals are very aware of the history of the conflict and tension that dominated the early decades. Hence, they are sensitive to possible wanderings from the balance of competition and collaboration. But this may not be the case in all organisations. Further research is thus needed to explore how history might affect the role of guardrails. Do festivals that have a dysfunctional history of competition and collaboration need the same kind of strongly diverse guardrails observed in previous studies (e.g., Pache et al., 2023)? Are younger festivals particularly more likely to be in need of 'louder' guard rails? Moreover, borrowing from studies of other organisational forms (e.g., Sasaki, Kotlar, Ravasi, & Vaara, 2020; Ravasi, Rindova, & Stigliani, 2019), how festival's frame their history could be an important influence upon the appropriate means and effectiveness of balancing multiple goals. More work on the nature and effect of history could be highly informative.

Conclusion

The Festival Organisation is an important but not well-understood organisational form. It is important, as we noted earlier, not only because of its widespread and growing international adoption, but because it is an important vehicle of social inclusion. Schüßler and Sydow (2015) refer to Festival Organisations as "social arenas", which resonates with what a former Art Festival Director told us:

> There is something actually deeply human about festivals in terms of like, if you think right back into the midst of time, you know**,** humans have always kind of wanted to have these moments of kind of coming together… I think that we want to come together and festivals actually are one of the ways in which we choose.

Festivals matter, in other words, because of their role building a shared sense of identity and social cohesion (UNESCO, 2015, 25).

Our findings have unearthed the structural arrangements of the Festival Organisational form, and the mechanisms and features – notably, compressed temporal and geographical compression, temporal rhythm, status similarity, an overarching status boundary, and a quiet third-party guard rail – that enable the accomplishment of an appropriate balance between inspirational competition and collaboration. Further, in developing insights into the Festival Organisation our case study suggests features of boundary work that have been little explored and that speak especially to Langley et al.'s (2019) call for more examination of the relationship between competitive and collaborative boundary work, and the means by which that relationship can be sustained over time. Our hope, therefore, is that our analysis of the Festival Organisation will inform further studies of this socially important and, we submit, strikingly interesting organisational form. In addition, we hope that this paper portrays what makes the Edinburgh Festival distinctive and may act as a 'leitmotiv' and wake-up call for policy development for cultural organisations world-wide.

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CHAPTER 6 - TEMPORAL BOUNDARY WORK AND THE BALANCING OF SHORT-TERM AND LONG-TERM DEMANDS: ACHIEVING MISSION ALIGNMENT THROUGH ORGANISATIONAL DESIGN (PAPER 3)

Abstract

In the complex landscape of organisational dynamics, my study delves into the crucial issue of mission drift, placing a significant emphasis on structures that not only address but actively facilitate the simultaneous pursuit of multiple missions. While current research predominantly focuses on reactive measures, such as adjusting organisational structures post-mission drift or balancing co-existing missions, there is less research on understanding how to proactively prevent mission drift while maintaining the simultaneous pursuit of multiple missions. To address this, I use the Edinburgh Festival as my empirical setting, an extreme case of an organisation that must accommodate eleven highly distinct missions. By adopting a boundary work lens, this paper contributes theoretical insights, particularly in the realm of mission management and temporality, by identifying organisational design elements essential for the coexistence of multiple equally significant missions.

Keywords

Mission drift, temporality, organisational design, boundary work

A previous version of this chapter has been presented at the Academy of Management Annual Meeting 2023.

Introduction

Organisations are liable to experience mission drift as managers shift focus from the original mandate of the organisation to other, usually more recent, objectives. The risk of one mission overshadowing another can lead to a perception that the organisation is not genuine or true to its stated principles (Grimes, Williams, & Zhao, 2019) and ultimately organisational failure (Vikkelso, Stokholm Skaarup, & Sommerlund, 2021). Research has identified several mechanisms to potentially correct mission drift. Guardrails (Smith & Besharov, 2019), selective coupling (Pache & Santos, 2013), compartmentalisation (Binder, 2007), the utilisation of negotiation arenas (Battilana Sengul, Pache, & Model, 2015), strategically designed and situated discussion framework (Canales, 2014) and fostering shared belonging through communal interaction (Battilana & Dorado, 2010) have been uncovered as ways in which multiple missions can be managed.

Each of the studies cited above has focussed on how organisational structures and processes can be adjusted once mission drift has taken place or on how to balance and adjust missions so that they can co-exist. Much less attention has been given to how mission drift can be prevented from happening in the first place while keeping multiple missions equally in play. Thus, an important question that emerges is how leaders can design organisations to prevent mission drift from occurring. Indeed, the pursuit of different missions inevitably presents different temporal demands on organisations, and, as I show, challenges leaders to design organisations to sustainably accommodate both short- and long-term objectives. Thus, my purpose in this paper is to explore *how organisations can be designed to facilitate the simultaneous pursuit of multiple missions.*

To gain a detailed understanding of how organisational structures develop, I adopt a boundary work lens. Boundary work reveals the purposeful action of individuals, groups, and organisations in creating, contesting, and configuring boundaries between individuals, departments, and organisations (Langley et al., 2019). Of particular interest in my study is the role of temporal boundary work in the development of organisational structures.

My empirical setting is the Edinburgh Festival, an extreme case of an organisation that must accommodate eleven highly distinct missions. The Edinburgh Festival vividly shows how a diverse range of missions not only emerged but were successfully accommodated without mission drift occurring. Through a longitudinal study involving interviews and documents, I uncovered specific categories of temporal boundary work that were important for the

emergence of an organisational design that facilitated the simultaneous pursuit of multiple missions over an extended period.

My paper provides theoretical insights into temporality and mission management by exploring the organisational design elements needed to allow for multiple, equally important missions to co-exist. First, I show how it is not simply the existence of structural differentiation and integration that is important, but the precise way in which organisations are designed to achieve a balance between time periods used for organisational and department missions. Second, I show how these structural arrangements require the establishment of buffer zones that create temporal boundaries that provide organisational members with the space to pursue and accommodate conflicting temporal demands. Finally, I show how temporal boundary work allows organisational members to reconcile competing missions in the context of ongoing and distinct temporal pressures.

Theoretical Context

Mission Management and Organisational Design

Research has shown that, to be successful, organisations need to effectively communicate their missions (Pache et al., 2023). Missions define the longer-term, strategic purpose of an organisation and articulate its core values, goals, and the impact it aims to achieve. This helps align employees' efforts and fosters a sense of purpose. Missions attract investors by providing a clear statement of the organisation's objectives and its potential for financial success. While communicating with stakeholders, missions provide a transparent overview of the organisation's intentions and commitments to customers, partners, and regulatory bodies. Hence, missions play a crucial role in moderating between different organisational goals. Missions also serve as guiding principles for decision-making, helping prioritise objectives and resolve conflicts that may arise from competing interests within the organisation (Battilana et al., 2022; Vedula et al., 2022; Wagenschwanz & Grimes, 2021; Grimes, Williams & Zhao, 2020). When organisations attempt to embrace multiple missions, one mission may be emphasised at the expense of another that was previously dominant, a process known as mission drift (Jones, 2007).

Research has often shown how mission drift occurs when a social mission is subjugated by a commercial one (e.g., Ebrahim, Battilana, & Mair, 2014; Ramus & Vaccaro, 2017; Jones, 2007; Weisbrod, 2004). Focussing too narrowly on one mission can result in a restricted perspective

of the organisation, which can create opportunities for wrongdoing (Fey & Amis, 2023) and decrease the chance of organisational survival (Battilana et al., 2017).

The majority of organisations face the challenge of managing multiple missions. Hence, mission management has been identified as an important organisational challenge (Pache et al., 2023). The literature discusses various ways of managing missions from integrated (Smith & Besharov, 2019; Battilana, Sengul, Pache, & Model, 2015) to differentiated (Mitzinneck & Besharov, 2019; Santos, Pache, & Birkholz, 2015) approaches. Integrated approaches focus on bringing different actors together to work on an overarching mission or to bring multiple missions together. For example, departments are put together to work together on multiple missions in an organisation (Battilana et al., 2015). Differentiated approaches focus on separating different missions; here actors are divided based on the mission they follow. For example, a new board structure may be applied (Smith & Besharov, 2019) or departments can be split up to work focused on one mission (Mitzinneck & Besharov, 2019).

These studies on integration and differentiation have their focus on how organisations address mission management by adjusting and moderating structures and objectives to accommodate different missions. However, not all organisations managing multiple missions face mission drift. The question then becomes how organisational design might prevent mission drift from taking place if the organisation follows multiple even contradictory missions. This is the focus of my study.

Boundary Work and Temporality

An important component of organisational design is the creation of structures within the organisation, by creating boundaries that define roles and responsibilities. The value and work an organisation performs, actors within the organisation, and practices and culture will all influence the boundaries of the organisation and its sub-units. As such, boundaries fulfil allocation functions by establishing limits and helping to shape interactions among different parts of the organisation, maintaining order and avoiding conflicts (Gieryn, 1983). They provide a framework for understanding how different parts of the organisation operate and interact (Comeau-Vallée & Langley, 2020).

What is apparent from previous research is that the establishment of boundaries becomes a pivotal factor in determining an organisation's design as they not only outline the scope and functions of different departments and hierarchies but also serve as the framework for negotiations among organisational members (Soubliere & Gehman, 2020; Askin & Mauskapf, 2017; Bechky, 2006). Examples of the role of organisational designs are Soubliere and Gehman

(2020), who analyse the legitimacy of start-ups that pitched their ideas on a crowdfunding platform, and Bechky's (2006) analysis of film sets as temporary organisations. In these diverse organisational settings, boundary work focuses on the purposeful work performed by actors to create, maintain or destroy boundaries to achieve a specific goal. Boundary work can differ from organisation to organisation and department to department depending on its goals. It has consequences for the organisational life through influencing collaborations, competitions and missions that co-exist in an organisation. As such, boundary work shapes organisational design and can help us understand how organisations navigate diverse goals (Langley et al., 2019).

There are three main, interrelated forms of boundary work, competitive boundary work, collaborative boundary work and configurational boundary work (Langley et al., 2019). Competitive boundary work is performed by organisational members and organisations creating boundaries to protect their territory and determine who is included and excluded. Collaborative boundary work is used to realign boundaries and allow negotiation and ultimately collaboration and learning. Finally, configurational boundary work is utilised to design boundaries that determine how various subgroups will be differentiated and integrated. For this paper, I focus on configurational boundary work and its focus on "how people work from outside existing boundaries to design, organise, or rearrange the sets of boundaries influencing others' behaviours" (Langley et al., 2019: 707).

Configurational boundary work takes place through arranging, buffering and coalescing of boundaries. First, arranging describes the process of forming existing activities through boundaries, allowing differentiation or integration. The arranging of boundaries takes place from outside of the boundary to influence activities. The agency lies with the organisational member or organisation that initiates it. A seminal example is Lamont and Molnar's (2002) study on processes across institutions, which focuses on social and symbolic boundaries that distinguish individuals and groups. Arranging boundaries often involves the creation of safe spaces in which to experiment (Zietsma & Lawrence, 2010).

Second, buffering "is the regulation and/or insulation of organisational processes, functions, entities, or individuals from the effects of environmental uncertainty or scarcity" (Lynn, 2005). Buffering outlines how boundaries are used to shape existing activities, where organisational members or organisations with competing interests are encouraged to collaborate through the creation of dedicated spaces. Guston's (1999) seminal piece on boundary organisations describes how an organisation can accomplish this. He takes these ideas further in his 2001

paper, where he examines the purposeful creation of spaces, which allows science and politics to work together to create policies as a case of boundary blurring (Guston, 2001).

Lastly, coalescing focuses on the bringing together of organisational members and organisations to create new activities. Such efforts can for instance be observed when looking at the integrated healthcare systems in many countries (Tazzyman, Mitchell, & Hodgoson, 2021). Configurational boundary work can be used to redesign organisational structures of collaboration and competition (Langley et al., 2019). These examples show how configurational boundary work can be used in organisations where members have competing interests to develop and change their structures and influence their organisational designs.

Configurational boundary work presents boundaries as tools that allow a combination of integration and differentiation (Langley et al., 2019; Lawrence and Lorsch, 1967). Configurational boundary work is thus particularly appropriate for considering a deeper understanding of organisational design arrangements that allow diverse organisational members to collaborate and compete. Configurational boundary work can involve redefining departmental structures, revising communication protocols, or implementing new policies to influence how employees might interact and collaborate (Bucher & Langley, 2016). Hence, configurational boundary work can help analyse how differentiation and integration within an organisation can facilitate the pursuit of different activities (Langley, et al., 2019).

An interesting characteristic of configurational boundary work that we know very little about is the role of temporal boundaries in the accomplishment of organisational objectives. Bucher and Langley (2016: 605) provide examples of an overarching temporal boundary as "defined by the length of an initiative." The authors describe the setting of a specific meeting time or a change in meeting times as the creation of a temporal boundary, which protects interactions that take place during this time period. Time becomes a matter of conflict and negotiation in bigger or more diverse groups working together as different understandings of time collide. They do not, however, explain how temporal boundaries influence the organisational structure over longer amounts of time. Bucher and Langley (2016: 612), therefore, call for more extensive study of organisational structures that "may act synergistically, interfere with each other or coevolve."

Another perspective on temporal boundaries refers to their ability to organise activities, processes, and events through a specific timeframe (Stjerne et al., 2018). Different organisational members are likely to have different assumptions and concepts of time (Yakura, 2002). Time becomes a matter of conflict and negotiation in bigger or more diverse groups

working together as different understandings of time collide. For instance, Stjerne and colleagues (2018) explore how temporal boundaries, arising from diverse permanent and short-term structures, affect interorganisational projects. The intersection of these structures can create challenges in cooperation and coordination, leading to conflicts in project goals. Understanding and managing these temporal boundaries become crucial for inter-organisational projects. While the study provides interesting insights into the management of short-term projects, it highlights the need to explore the management of time to achieve goals in "more permanent organisations" (p.363). The importance of managing temporal boundaries to achieve short-term goals in Stjerne et al.'s study opens the pathway to explore how temporal dynamics might influence long-term missions in organisations.

In addition, temporal boundaries are also portrayed as a previously unrecognised form of managing repetitive activities and interactions in organisations (Geiger et al., 2020). Geiger et al. (2020) examine how firefighters used temporal boundaries to coordinate their actions. Their study raises the question of how individuals manage their activities when external factors, such as deadlines or schedules, play a more dominant and consistent role in shaping the timing and coordination of their routines. In its allocation function, temporal boundary work involves the strategic assignment of time, scheduling, sequencing, and coordination of tasks to optimise efficiency, and effectiveness, and achieve goals within an organisation (Bansal et al., 2022). Bucher and Langley (2016) examine the role those temporal boundaries can play in enabling organisational activities through the arrangement of boundaries over time.

Organisation members constantly and simultaneously enact and reinterpret time (Hernes, 2014) to conduct activities and fulfil their goals. This makes the work on temporal boundaries important as it has the potential to further our understanding of how multiple organisational missions may be pursued. Langley and colleagues (2019) are among those who have called for more research into temporal boundaries in general and their role in organisation design in particular. I address this by studying the Edinburgh Festival Organisation, a highly diverse organisation that has to embrace several very distinct missions.

Methods

Research Context

My research is located in Scotland's capital city, Edinburgh, known around the world for its festivals. The Edinburgh Festival Organisation consist of eleven constituent festivals with different target groups, artistic visions and missions. However, they manage to work remarkably well together. They identify as 'the Edinburgh Festival', with a website that

showcases all festivals and their missions (https://www.edinburghfestivalcity.com/). Delegations from across the globe visit the Edinburgh Festival Organisation to gain insights into how this multitude of festivals has been managed sustainably over many years.

Research Design

Following Pache et al.'s (2023) suggestion to explore organisational structures that facilitate the successful coexistence of multiple missions within an organisational framework, the Edinburgh Festival is a particularly compelling case study. It contains eleven separate organisations each with its distinct mission. Table 6.1 an overview of each data source and outlines how I utilised the data in my analysis.

Table 6.1. Data Sources

Archival Documents		**Approximate Number of Pages**
	Historic Environment Scotland/ Edinburgh City Archive	391
	Glasgow University Archive (flyers, maps, performer information, registration sheet, ticket collection sheet)	48
	The Edinburgh Fringe by Alistair Moffat	138
	Festival of the North: Story of the Edinburgh Festival by George Bruce	253
Interviews		**Number of Interviewees**
	City Officials	9
	Government Officials	7
	Other stakeholders	11
	Festival Directors	29
	Secondary interviews with Festival Directors	15
Strategy Documents		**Approximate Number of Pages**
	Future Fringe Report	13
	Fringe Development Goals	9
	2030 Vision for a Resilient and Ambitious Festival City	32
	Development of 2030 Festival City Version Summary of Feedback from city communities of interest [March 2022]	3
	Draft Festival City Vision To 2030 [August 2021]	3
	Edinburgh's Festivals: A Collaborative Story	63
	Report for Festivals Edinburgh and Policy Evidence Centre (PEC)	78
	Thundering Hooves Two	93
	Thundering Hooves Report	87
Illustrative Secondary Sources Consulted		**Approximate Number of Pages**
	Stage Articles	33 pages
	Scotsman Articles	25 pages
	The Guardian	6 pages
	Documentary "The World in One City"	65 minutes

Data Collection

The data used in this study (see Table 6.1) is part of a larger research project. I relied on two primary sources of information: documents and interviews. I first examined the rich archive of documents that provide a history of the festivals in Edinburgh. Those were supplemented with more contemporary reports, minutes of meetings and popular press reports that provided us with insight into how the Edinburgh Festival Organisation was formed and has developed over time. Chapter 3 contains further information about the data collection stage, with a focus on how the documents were collected and how the research topic manifested itself, along with my approach to data analysis.

Documents

My study began with an examination of the *Thundering Hooves Report*, which played a pivotal role in the establishment of the Edinburgh Festival. This report provided me with an initial understanding of the various festivals involved and the necessary efforts for their successful operation. Based on the *Thundering Hooves Report* I went to the websites of each festival to examine their mission statement. I also accessed further documents that supported me in developing a first understanding of the existing missions and boundaries at the Edinburgh Festival. For instance, the *Thundering Hooves 2.0* report in 2015 evaluated the accomplishments and opportunities of the initial nine years, and also provided initial insight into the boundaries created at the organisation's inception. In 2022, the festivals collectively crafted the strategy document '*2030 Festival City Vision*', drawing on the perspectives of employees, managers, and directors across all participating festivals. Those documents were also helpful in identifying specific topics for more in-depth discussions with interviewees.

Interviews

I conducted a total of 56 interviews and obtained an additional 15 secondary interviews, as outlined in Table 6.1. My interviewees included senior government officials, directors of the constituent festivals, and various stakeholders, such as leaders from public bodies Creative Scotland and EventScotland, who played significant roles in the development of the Edinburgh Festival Organisation. All interviews followed a semi-structured format, with questions specifically crafted to explore the challenges associated with accommodating multiple missions.

Data Analysis

In my abductive analysis, I iteratively moved between my collected data, existing literature, and emerging theoretical constructs, drawing on the framework articulated by Dubois and Gadde (2002). Through this process of gradual abstraction, I organised the raw data into categories, connected these categories to overarching themes, identified missions, and instances of mission management, drew organisational boundaries, and aggregated these themes to develop theoretical insights (Pratt, Rockmann, & Kaufmann, 2006).

Stage 1: Understanding the Missions within the Organisation. My initial objective was to uncover the missions held by the constituent festivals within the Edinburgh Festival. I began by thoroughly reviewing the strategic documents, which provided me with a comprehensive overview of the significant developments from the inception of the Edinburgh Festival to its current organisational design. Subsequently, I analysed strategy reports and festival websites to identify the missions. I checked the mission of each organisation with a member of the organisation.

Stage 2: Identifying how Missions are managed in the Organisation. I then started to look into the design elements that developed in the organisation to accommodate the different missions. I was struck by the organisation facing the incredible problem of keeping all missions alive while also encouraging the eleven members of the Festival Organisation to work together. To understand how the organisation achieved this, I decided to categorise the key design elements that were emerging from my data. The first key element that became apparent was the creation of a Governance Board, a Committee of Festival Directors and several Working Groups. I then coded the activities of these three organisational design elements to understand their roles in the organisation.

To provide an example, I coded the data on the Working Groups to understand how they were created. This showed me that the Governance Board arranged the Working Groups and also designed buffer zones to provide a space where the festivals could come together to discuss topics outside of their organisation. I identified that what was emerging from my data was consistent with what Langley et al. (2019), and others, have conceptualised as ‘configurational boundary work’.

Stage 3: Emerging Mechanism that enables multiple Missions to co-exist. The majority of the boundary work performed by the Governance Board was coded as temporal boundary work. This sub-category was used to describe instances where the Governance Board, the Committee

of Festival Directors and the Working Groups actively established temporal boundaries, enabling the organisation to operate smoothly, even though its members had different ideas and varying requirements.

Findings

The Edinburgh Festival Organisation was required to pursue eleven missions without any emphasis or prioritisation. This was accomplished through the creation of a Governance Board, a Committee of Directors, and several formal and informal Working Groups. With eleven festivals, each possessing individual missions, avoiding getting stuck in discussions about individual concerns was of key importance. The Edinburgh Festival Organisation had developed an organisational design to achieve this and used an acute temporal understanding to moderate between the individual missions while keeping the importance of each mission. I present the eleven missions before showing how the Edinburgh Festival Organisation's design effectively accommodates and facilitates their accomplishment.

The Missions within the Edinburgh Festival Organisation

There were eleven members of the Edinburgh Festival Organisation. Each festival followed its mission. The Storytelling Festival Director emphasised the distinctiveness of each festival by telling me that "each festival has a strong boundary around their organisation." Within the Edinburgh Festival every festival stayed independent, was acknowledged as important and followed its own mission. Table 6.2 below provides an overview of the members of the Edinburgh Festival, their size, target audiences and missions.

Table 6.2. Overview Edinburgh Festival Organisation Members Size, Target Group and Main Mission before 2005

Festival	Founding Date	Organisational size measured in permanent staff	Target Group of Audiences	Mission
International Festival*	1947	61	Local and international people interested in classical music, dance and opera, mainly adults	We exist to promote the exchange of ideas and deepen understanding between cultures through a global celebration of exceptional performing arts (International Festival Website).
Film Festival*	1947	20	International independent film scene, talent scouts, film enthusiasts	EEIF celebrates great new Scottish cinema, the best films from around the world, and the talent bringing their vision to the screen…Key to the EEIF mission is the identification, exposure and development of new filmmaking talent and the legends of the future (Film Festival website and brochure).

Military Tattoo*	1950	38	Locals, tourists and international army representatives	To produce atmospheric spectaculars that enrich lives through creativity, connection, and contribution (Military Tattoo staff member interview).
Fringe Festival*	1958	39	Talent scouts for TV and film, tourists, locals, comedians	To be an open-access arts event that welcomes anyone with a story to tell and a venue to host them (Fringe Society CEO interview).
Jazz Festival	1978	4	Jazz enthusiasts (80% locals)	To be one of the world's leading jazz and blues festivals, celebrated for pushing creative boundaries and breaking down barriers to the discovery and celebration of music (Jazz Festival website).
Book Festival*	1983	22	Local authors and readers	The Book Festival aims to inspire people of all backgrounds and ages to explore new ideas and expand their horizons. (Book Festival website)
Science Festival	1989	7	Children and adults, mainly from around Edinburgh	Inspiring, encouraging and challenging people of all ages and backgrounds to explore, understand and engage with the world around them (Science Festival website).
Storytelling Festival	1989	7	Mainly local enthusiasts of storytelling; children and adults	To connect community, folklore, and creativity, by drawing on the arts of oral storytelling. To develop, sustain, support and maximise the potential of storytelling as a diverse and inclusive resource for Scotland's artists and communities, locally, nationally and internationally (Storytelling Festival Director interview).
Children's Festival	1989	12	Children, Schools	Connect children, artists and teachers in the creation and presentation of exceptional work that resonates, reflects and extends the world of children and young people. Nurture, support and encourage artistic excellence by offering a range of opportunities to Scottish-based artists, and freelancers (Children's Festival CEO interview).
Edinburgh's Winter Festivals (contracted by the council)**	1993	1	Tourists and locals visiting for the Christmas markets and Hogmanay	Edinburgh's Winter Festivals promote Edinburgh as a fascinating city and tourist destination. It aims to create magical experiences for locals and tourists through the Christmas Market and Edinburgh's Hogmanay Festival (Culture and Communities Committee member interview).
Art Festival*	2004	10	All visitors to the city in August	We support Scottish and international artists to make new and ambitious projects which engage with the extraordinary context of Edinburgh in August (Art Festival website).

* Take place in August

** The council decides on the mission, and a private company is contracted to deliver the festival; all other festivals are charitable organisations.

The diversity of missions among the festivals in Edinburgh caught my attention. The International Festival, for example, had focussed specifically on international artists who

showcase their art at the best institutions worldwide. The festival positioned itself as the pioneer as it was the first festival to take place in Edinburgh after the Second World War (International Festival, 2023). This festival's mission was to bring world-class artists to Edinburgh, who perform in large, prestigious concert halls in Edinburgh. Since 2023, the festival had showcased some of its performances in its headquarters, in contrast to sourcing new talent, they drew on established performers. The time horizon to book those international artists could be very long. For example, "to book the Philadelphia Philharmonic orchestra takes three years as they are fully booked before" (member of the International Festival). The main stakeholders were the Edinburgh City Council and the Scottish Government. However, the International Festival builds cross-national collaborations, forming partnerships with government representatives from the artist's countries of origin.

In contrast, the Film Festival focused on independent film "to keep the flame of independent cinema burning" (Film Festival, 2023), showcasing movie premiers and promoting their filmmakers. It did only have a limited number of own venues, but showcased its movies in Edinburgh's cinemas. Its mission was to support workers in the film industry and their projects by giving them a stage. The festival was currently struggling to survive but had been achieving support through Screen Scotland, the Scottish Government and the City Council, its main stakeholders.

The Military Tattoo did extensive advertisements. During the festival month of August, a large picture of the Military Tattoo (20 meters wide, 5 meters high) coverd a wall in the Edinburgh Airport area for international arrivals (members of Military Tattoo). In the words of a former member of the International Festival, "The Tattoo does enough peacocking for all of us together". Its audience was locals as well as many tourists, especially from overseas who came to Edinburgh and experience the themed military parades at the Edinburgh Castle (member Military Tattoo). The entrance price of the tickets was used to finance the event and to support charitable organisations about the armed forces.

The Fringe Festival focused mainly on comedy, busking and niche theatre. It aimed "to Give Anyone a Stage, and Everyone a Seat" (Fringe Society CEO). No curating of a festival theme or programme took place. The Fringe functioned as an open-access platform where artists sign up to participate. In contrast to the other festivals, its venues were mainly pub backrooms, churches, the street and some small theatres. The Fringe did not have a venue to showcase performances. As the largest festival in Edinburgh, its stakeholders were very diverse and ranged from accommodation providers, universities, international art committees and disability

charities, to the City of Edinburgh and national and international governments (Fringe Development Goals, 2022).

The Jazz Festival's mission was to advertise and showcase the diversity of Jazz as a distinct art form in Scotland. The festival focused on the dissemination of Jazz as a type of music within Scotland. The Jazz Festival took place in different locations in Edinburgh, notably the Jazz Bar. The audience was encouraged to listen to jazz musicians from Scotland and abroad. They especially championed young artists and Scottish talent. The main stakeholders were the Edinburgh City Council and the Scottish Government (Jazz Festival, 2023).

The Book Festival had its target group of readers and authors. The mission of the festival was to promote connections between authors and books that can be bought at the event. "The festival created a connection between authors to allow networking as well as to raise awareness for specific books and genres" (Book Festival member). To connect with local audiences the Book Festival worked with Scottish prisons, hospitals and art organisations as well as refugees and homeless people (Book Festival, 2023). Over the past decades, the Book Festival took place as an open-air event, in a private garden. From 2024, the Book Festival will take place in the Edinburgh College of Art, which will become its permanent venue (member Book Festival).

The Science Festival had its target groups of adults and children from around Edinburgh. The mission of the festival was to inspire and encourage its audience to engage with the world around them through "experiments, readings, lectures and panel discussions" (Director Science Festival). The festival's main focus was on climate change and sustainability. It was the first festival to start "a conversation about sustainability" (Director Science Festival) right after its founding in 1989. The Science Festival did not have a permanent home but cooperated closely with museums, the University of Edinburgh and Edinburgh City Council to gain access to venues.

The Storytelling Festival was again very different. It focused on traditions of music, song, storytelling, dance, crafts, customs and local languages to celebrate Scotland's heritage (TRACS, 2023). It had "a curated programme inviting storytellers to come to Edinburgh and present their work" (member Storytelling Festival). The Storytelling Festival had its own, permanent venue, the Storytelling Centre. Its purpose was to keep the profession of storytelling alive and raise awareness of storytelling. The Edinburgh City Council and Creative Scotland, a cultural development branch of the national government, were the Storytelling Festival's stakeholders.

The Children's Festival worked with Scottish schools to provide access to art and theatre to children from diverse backgrounds. It accomplished its mission through theatre projects with schools, working together with teachers as well as providing free shows that children and their parents can visit during the festival in May (Chair Children's Festival). Its ambition revolved around providing access to an often-inaccessible form of culture to children originating from diverse socioeconomic backgrounds. The main stakeholders were the Edinburgh City Council and the Scottish Government.

The Winter Festivals, as a City Councillor told me, were organised by an event agency with which the council has contracted. The mission of this event agency was to advertise Edinburgh as an attractive holiday destination and event location. The New Year's Eve fireworks were broadcast around the world. The objectives of this festival were not charitable. The three-day New Year's (Hogmanay) celebration took place outside, with streets and parks closed off to facilitate the event. The main stakeholders of the Hogmanay festival were Edinburgh City Council as well as private companies, with whom they formed partnerships.

Finally, the Art Festival's mission was to showcase art ranging from paintings to art installations. The Art festival took place in Edinburgh's galleries and art museums and "explores a common theme" (member art festival) that was showcased in those venues. In addition to the galleries within Edinburgh, Jupiter Artland, an outside art park also participated in the Festival (Jupiter Artland, 2023). The Festival did not have set venues and had the Edinburgh art galleries and museums together with its audiences and artists as its main stakeholders (member Art Festival).

The diversity of missions led to distinctive identities as described in the words of a staff member from the Festival Organisation:

> We have always recognised that the different festivals have very distinctive identities and are, you know, kind of quite fiercely championing those identities because they speak to particular creative communities and audiences.

For example, although the Science Festival and the Book Festival explored the world by thinking creatively, the means of accomplishing their missions were quite different. Whereas the Science Festival achieved this through experiments, speeches, shows, and collaborations with museums and public facilities, the Book Festival invited authors, sells books, and provided a space for readers and authors to connect.

Background of the Edinburgh Festival Organisation

Sixty years after the initiation of the first festivals in Edinburgh, the official Edinburgh Festival Organisation was established[5]. Before its formation, the festivals had more informal relationships, engaged in competition, and had little or no forms of collaboration. Over the years, the Festival Organisation acquired the necessary prerequisites that are now instrumental in managing multiple missions. Many individuals who played key roles during those 60 years remained in their positions for an extended duration and maintained close connections with their successors. Recognising the importance of communication, they cultivated a deep understanding of each other's roles. The Festival Organisation accumulated detailed knowledge from both mistakes and best practices. This knowledge was further disseminated through the commissioning of the Thundering Hooves Report, published in 2005.

The overarching focus of the *Thundering Hooves Report*, and the follow up *Thundering Hooves 2.0* in 2015 was on fostering long-term strategic relationships among the festivals, something that at the time seemed inconceivable.

> *Thundering Hooves* was good. It coalesced the festivals together over common themes. I think it drew them a bit closer together where there was a shared interest. (Manager at the Fringe)

> We never intended for the collective to have the outcome of changing the identities of the individual festivals. I think that what has happened is that people have started conversations which have led to some shared ideas and understanding for each other. (Former member governance board)

Within the Festivals Organisation, the festivals needed to find a way of communicating with each other and balancing their missions. In the words of a staff member at the Festivals Organisation:

> I would not expect there to be a huge amount of pushback because those [the *Thundering Hooves Reports*] were the conclusions that made people think, 'Oh yeah, this is a good thing to get behind.' But recognising that not every recommendation was of interest to every festival. But at the same time, there was something in there that everybody was interested in.

The initial *Thundering Hooves Report* not only evaluated the current state of affairs but also provided recommendations for future actions. It recommended that the festivals would increase their effectiveness if they co-created an organisation that they would all be part of, called 'Festival Organisation'. The Festival Organisation is a highly integrative device.

In this organisation the festivals would work together and present themselves united for marketing and funding purposes. Given the heavy differentiation of the individual festivals and

[5] Chapter 5 provides a detailed background of the formation and development of each festival.

their mission diversity, the key challenge in this process was to find a way that allowed each festival to follow its mission. The complexity of the eleven different organisations which the Festival Organisation consist of needed to be taken into account. The two key characteristics that emerged to integrate the festivals and allow different missions to be facilitated were first, the organisational design arrangements in the Festival Organisation creating a structure that allowed the festivals to communicate and collaborate and second, the creation of buffer zones creating time periods to bring the different festivals together.

Design Arrangements in the Edinburgh Festival Organisation

Based on the recommendations of the *Thundering Hooves Report* and the learnings of the 60 years before the new organisational arrangement, the Directors of the Edinburgh Festivals understood that they needed to focus on the development of an organisation that allowed the different missions of the festivals to co-exist, guide communication and utilise the knowledge of all festivals involved to also achieve overarching goals. In the words of the Festival Organisation on their website (www.edinburghfestivalcity.com/about):

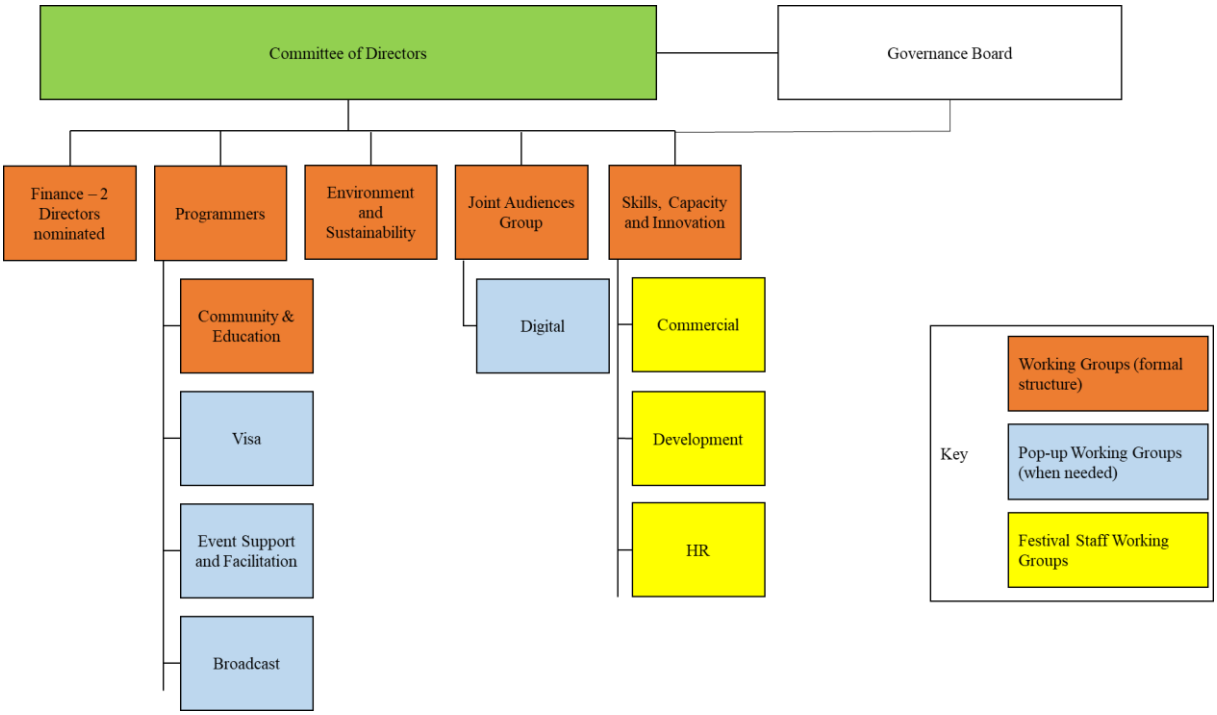
> Building on a culture of collaborative working the Directors of Edinburgh's leading Festivals came together in 2007 to formally establish [the Edinburgh Festival Organisation] with a mission to maintain and develop the value of the Festivals' and the Festival City's position locally and globally, through:
>
> • development and delivery of collaborative projects and initiatives which support programme development, leadership and audiences
>
> • acting on behalf of and representing the collective strengths of the Edinburgh Festivals

The core strength of the Festival Organisation was in its commitment to maintaining the independence and significance of each festival. To achieve this the festivals were given instruments that allowed them to equally raise their voice. In the words of a member of the Festival Organisation "In our founding documents of Festivals Edinburgh [the Festival Organisation], there is something around every director having the right to veto".

The way how the festival organisation was structured was crucial for the facilitation of multiple missions (see Figure 6.1). A member of the Festival Organisation explained the importance of their organisational structure to us:

> The structure of the organisation - with each festival equally represented - is fundamental to maintaining good working. This structure was there from the start and on purpose.

Figure 6.1. Structure of the Festival Organisation (adapted from Festivals Edinburgh, 2023)



Based on its founding documents, the Festival Organisation aimed to create an integrative organisational structure where all festivals would be equally represented. As a result, three design elements emerged as central for the Festival Organisation in facilitating multiple missions, a) a Governance Board (white), b) a Committee of Festival Directors (green) and c) Working Groups (orange, blue and yellow). Those organisational design elements fulfilled different roles in arranging boundaries within the Festival Organisation. They functioned as integrative devices that brought the different festivals together and evened the path to facilitate multiple missions. Table 6.3 provides an overview of the different arranging functions.

Table 6.3. Arranging and its Consequences for Organisational Design and Mission Management

Design Element concerned	*Arranging Boundaries*	*Consequence for Organisational Design*	*Consequences to Mission Management*	*Case Example*
Governance Board	Sequencing Activities	The Governance Board sets the order for activities of the Committee of Directors and the Working Groups; focus only on topics relevant to all festivals involved.	The Festival Organisation sets the order of events to ensure that topics discussed first are relevant to all. The festivals feel equally treated and as such tendencies to push one mission without consideration of the others is decreased.	The Governance board reached out to the Festival Directors and suggested an HR Working Group to deal with the Visa difficulties due to Brexit that all festivals faced. It suggested to focus on this topic and encouraged HR members of all festivals to come together in the newly created HR Working Group to discuss their situation, share best practices and develop solutions. For example, they put the discussion about the Brexit Visa issue for EU artists first, as this was a problem for all festivals. The exchange provided all organisational members with an increased understanding of their missions and challenges.
	Pacing Activities	Determining the urgency and speed things are looked at in the Committee of Directors and the Working Groups.	Based on the importance and urgency of a topic the amount of time spent and the speed of developing results is decided. The festivals develop a better understanding of each other's missions in the process.	The Governance board decides the speed at which to address time-critical topics. When the Edinburgh Council introduced its net-zero 2030 agenda, the Governance Board understood the importance of providing a sustainability agenda and encouraged the focus on this topic in the Committee Meetings. All festivals were asked to provide possible solutions to increase the sustainability performance of the festival and to hit the 2030 target.
	Supporting Consensual Decision-Making	Consensual decisions monitored by the Governance Board in organisational design elements like Working Groups and the Committee of Festival Directors	All organisational members feel accepted and therefore become more open to discussing their missions and areas of collaboration.	The Chair of the Governance board sits in the Committee of Festival Directors, they observe decisions are reached by everyone agreeing. Each mission is equally important.

Committee of Festival Directors	Establishing a Rotating Chair System	The chair of the Committee changes every 2 to 3 years.	The rotating chair creates a diverse perspective on tasks and mitigates power concentration among the festivals, which is important to accept multiple missions.	The chair position changed to the Director of the Art Festival, who understood for the first time the challenges of the larger, better-funded festivals and could see the importance of working together and listening to each of the festivals' missions.
	Initiating Structural Relationships	Stronger connections between individual festivals that lead to informal support between organisational members	Increased commitment among the festivals and increased willingness to tolerate different missions.	A member from the Book Festival shared a struggle with a portrayal in the media. A member of the Art Festival showed empathy and talked about a similar situation. Both members comforted each other and discussed potential solutions for the future. The different missions are personally associated with organisational members and as such have greater resonance.
	Creating a Shared Voice	Increasing trust and impact that reinforces the structure of the Festival Organisation	Speaking with one voice helps organisational members ensure different missions by creating a unified, coherent, and efficient communication strategy that fosters trust, clarity, and consistency across various stakeholders and missions.	If the festivals are required to generate funding or present themselves to stakeholders, they trust the chair of the Committee of Festival Directors to speak on their behalf. Confusion between the festivals is minimised and consistency in the Festival Organisation is achieved.
Working Groups	Creating Routines	Routines provide a shared framework for the members of the Festival Organisation to work together. It makes communication and coordination easier.	Routines provide the organisation with the stability needed to pursue diverse objectives while maintaining alignment, consistency, and adaptability across the various missions. Understanding between the festivals is increased and a space is created to discuss the different missions.	All Working Groups have a set schedule where they have agreed on how often they meet. This routine has been established over many years. In the Working Groups, the members from the different festivals bring their missions to the conversation.

	Prioritising	In most cases the Working Groups prioritise for themselves and decide what topic is important. As a result, within each Working Group the different missions of the festivals are discussed and supported. The design of the Working Groups means that members from all festivals are involved.	All missions are transparently communicated in meetings. The festivals feel agency as they decide what topic to discuss when (with the exception of unpredicted challenges that need rapid action). If needed time critical topics determine the meeting agenda except if a festival uses its veto right.	Prioritising time-critical topics. The Edinburgh Council introduced its net-zero 2030 agenda, as a result, sustainability became a topic of high importance. As a result, all Working Groups had to start thinking about how they could incorporate sustainability into their work.

The Governance Board. As a recommendation from the *Thundering Hooves Report*, the Festival Organisation created a Governance Board of independent staff members, who were not associated with any of the festivals (Figure 6.1). The Governance Board functioned as an independent entity that helped to moderate the different festivals and also spoke for the festivals in external meetings if needed without favouring one festival over another. The festivals listened to its suggestions and followed its strategic advice. As the independent part of the Festival Organisation, the Governance Board played a pivotal role in the design of the organisation by sequencing and pacing activities.

Activities were *sequenced* according to their priority. As such, the Governance Board created an annual schedule, which defined the order of tasks in the Festival Organisation's based on their priority. *Pacing* described the speed in which an activity is achieved. The allocation of resources significantly influenced the speed and, consequently, the completion time of each task. The Governance Board provided guidance to the Committee of Festival Directors on the pace at which activities should be conducted to meet the annual schedule. The Committee of Festival Directors was encouraged to prioritise topics and switch between them accordingly.

Sequencing Activities. The Festival Organisation had a clear understanding in which order topics should be addressed in the Festival Organisation. A member of the Governance Board described how the they discussed the prioritisation of topics with the Committee of Festival Directors in general:

> We agree annual operating plans with the [Committee] – these bring together a prioritised list of actions from our strategy documents, with the deliverables we have agreed with our third-party funders and partners, and we put timescales on many the outputs.

As shown in the quote above, the organisation identified and prioritised topics at the beginning of each calendar year. A member of the Governance Board explained further how they prioritised those topics by assessing what matters to all in contrast to putting aside what is only relevant to some festivals. The order in which topics are discussed is therefore an important task:

> We recognise that we are all different and are respectful of the need to consider, at times, issues that matter to some festivals and not to all. We share enough to hold us together, e.g., the need for funding and political support from the City and Scot Gov., licencing issues, and use of public spaces, as just some examples, that we all know it makes sense to work together. The Chair of the [Committee of Festival Directors] and [the Governance Board] are the ones who need to ensure this balance is maintained and that not one festival dominates.

As shown in the quote above, the equal treatment of all festivals was very important. Each festival got the same attention and support for its mission. As a result, tensions were moderated and mission drift could be prevented.

The sequencing of activities was not only important to develop a clear order, but it provided the festivals also with a tool if they encounter a challenge that has proven to be an obstacle in their progress:

> There are often project development loops where we take one step forward in terms of scoping out collective proposals for agreement and/or researching funders, and then regroup and try another solution if those proposals do not find a general consensus, or work out how to pilot solutions with a cluster of interested festivals rather than the whole group. We sometimes find that work we have previously done can be picked up and re-used or built upon in new ways in later years, which we can't always anticipate but we try to bear in mind. (Member, Governance Board)

Being able to try different solutions and to reflect about this process was a crucial skill for focussing on equally strong missions at the same time. Managing equally strong missions involved balancing priorities and allocating resources effectively. As such, the ability to explore different solutions and reflect on the process without getting stuck in unproductive paths was particularly relevant.

My interview with a member of the Governance Board showed further how existing activities in the Festival Organisation were protected and developed by dividing issues into areas to be discussed with all festivals and areas to be discussed by individual festivals or smaller groups. Within the Festival Organisation, boundaries were arranged to differentiate objectives relevant to all from objectives relevant to some. As the Director of the Art Festival explained:

> There are other sorts of smaller forums that kind of appear on the edges of [the Festival Organisation] which are focused around a very clear shared objective. For example, the Tattoo, International Festival, the Fringe and maybe to a lesser extent the Book Festival will at moments have kind of real points where they are all kind of wrestling with some very specific detailed issues that are less affecting other festivals and it makes sense for them to come together.

The recognition of distinct and common issues between the festivals was an important step in acknowledging their different priorities. This understanding helped the organisation also in its mission management. Similar to the order of topics being discussed, the attention paid to provide time and space for missions that were relevant to all festivals was crucial. Providing guidance on what matters to all was very important especially for the smaller festivals as the former Director Art Festival emphasised "to experience that we are as important as the larger festivals". The use of sequencing resulted in the festivals being acknowledged and a decrease of fear that their mission was not seen as important. The equal treatment lived and observed

through the actions of the Governance Board was internalised by the Committee of Festival Directors and the Working Groups.

Pacing of Activities. Pace referred to the changes of quick and steady work within the Festival Organisation. While some activities were conducted on a regular basis other tasks required a faster rate of completion.

> Sometimes the pace is dictated by events and resources or lack of them, or the ease or difficulty of gaining agreement across the board, or the timetable for external policy developments e.g., government visa policies or short term lets licensing, and is not a conscious choice. (Member, Governance Board)

Examining the pace that was being used to deal with challenges in the Festival Organisation provided insights about how the Governance Board worked together with the Committee of Festival Directors and the Working Groups. This fast and responsive approach to different challenges suggested a well-coordinated system that is able to adapt quickly.

The visa challenge brought about by Brexit was a telling example. The festivals needed to find a way of allowing artists to perform in the festivals without being stuck in a lengthy visa process. As a result, the Visa Pop-up Working Group (see Figure 6.1) got created as an initiative from the Governance Board, which prioritised this activity. As the name suggests, the Visa Group needed to be created quickly to deal with the problem before artists would have had to cancel their shows. The Pop-up Group "brought together HR staff from all the festivals" (member Storytelling Festival) to find a solution at a faster pace than initially planned. It resulted in a short cut for artists from EU countries to cross the border with an invitation letter from a festival instead of applying for a visa.

The above example shows the Festival Organisation's ability to respond quickly to changing needs by reallocating resources to solve new upcoming challenges. This distinct responsiveness was also key when it came to managing different, equally important missions. Each mission needed more attention from time to time than other missions due to changing (external) factors. Quickly reallocating resources and re-priorities to encounter upcoming challenges for one mission was therefore key. This level of responsiveness could only be achieved by a high level of communication between the organisational elements.

Further, the Governance Board encouraged the festivals to open up about challenges and opportunities when working together in the Working Groups as well as in the Committee of Directors. The development of a detailed approach to challenges that all festivals face as well as the sensitive approach to topics that do not need more than a surface conversation leaded to

the festivals understanding the challenges of their peers in detail and the repeated finding of collective solutions:

> I think that through my time with festivals Edinburgh I kind of began to recognise and engage also with a sense that it is all relative and that the International Festival or the Fringe, for all their bigger budgets, they were also still really struggling with a squeese and a shrinkage. (Member, Arts Festival)

As the quote above shows, the understanding among the different festivals increased and at times individual festival boundaries could become permeable to allow discussion of others' issues and provide support. Through the arranging function of the Governance Board permeable boundaries between the festivals were created. While each festival was highly distinguished from others in its mission all of them accepted the chance that comes with opening up about challenges and opportunities.

Consensual Decision-Making. To achieve consensual decision-making among the different interests of each of the festivals the Governance Board fulfilled an arranging function. The arranging among the different members of the Festival Organisation worked through careful observations of discussions in board meetings as well as working group meetings. For example, as one of the members of the Governance Board told us, he observed tension in a Working Group, while another member of the Governance Board saw an opportunity for collaboration. Those observations were shared within the Governance Board continuously as a member of the Governance Board described:

> Having that steady pulse of communication opportunities…every week there is a team meeting. So, one week it's all members of staff and the next week it is the managers. We are making sure that there is that weekly opportunity for people to speak to each other, we also have one day of the week when we all try and be in the office. So, we are physically together.

The steady pulse of communication in the Governance Board was important for the facilitation of multiple missions in the Festival Organisation. The Governance Board emphasised the focus on topics that were considered important by all festivals. To achieve this, the Governance Board suggested the isolation of a topic that was not relevant to all members and encouraged the individuals who would like to work on this matter to get together in a 'working group' meeting. As such, the Governance Board arranged boundaries by distinguishing topics that were relevant to all members of the Festival Organisation and topics that were not relevant to all.

Opportunities could be increased through the scale of the Festival Organisation and the feedback from other festivals that had previously tried similar ideas can be helpful. As a result, the members of the small and large festivals learned when to be focused on their organisation

and when to utilise the knowledge of their peers. An example from a member of a smaller festival, the Art Festival emphasised this:

> I think as a small festival, it also felt like an opportunity to kind of access information and conversations that you otherwise would be excluded from. And so, it felt really important to be in the room and for bigger festivals.

Furthermore, by sharing tensions and arranging opportunities for collaboration, the Governance Board assessed the potential for cooperation and gained insights into situations where various festivals may lean towards distinct solutions. This was important as distinct solutions could lead to tensions within the Festival Organisation, which could lead to individual festivals wanting to focus on their missions without paying attention to their peers. As such, those tensions could potentially result in mission drift.

Committee of Festival Directors. The Committee of Festival Directors (Figure 6.1) consisted of the directors of each of the eleven festivals and the CEO of the Governance Board. As with the Governance Board, the Committee of Festival Directors also had an integrative function. It brought all festival directors together for meetings and encouraged long-term strategic collaboration among the eleven festivals. Through the Committee of Festival Directors, the festivals coordinated their activities with each other.

Rotating Chair. The Chair of the Committee was chosen through a rotating system, where the Governance Board suggested which festival took the lead. To achieve this level of integration, the director of this festival then stayed in the Chair role for a period between one and three years, before another festival director took over the role. This system ensures that each festival director got the chance to lead the meetings and understand the difference between focusing only on the missions of their festival versus aiming to keep all festivals in mind. The chair needed to focus on the missions of all the festivals at the same time for the overall interest of the Festival Organisation.

> When I became chair of [the Committee of Directors], I think I also gained a much greater understanding of sort of some of the real challenges that my colleagues in larger festivals were facing. …I also felt there was a real attempt to build consensus. (Director, Art Festival)

To organise the Committee of Directors meetings, festivals were solicited via email to serve as hosts for committee meetings, facilitating an environment of shared ownership and collaboration, at the beginning of each calendar year.

> We have five [Committee] meetings a year, but obviously, there is a great deal of exchange that happens outside of those board meetings and we have 60 staff from across the festivals involved in Working Groups. So that is effectively nearly 50% of the year-round staff who are working for Edinburgh's festivals. (Member, Governance Board)

Initiating Structural Relationships. The Committee of Directors meetings encouraged the individual festivals to talk to each other through Working Groups as well as formal and informal events that bring the members of the Festival Organisation together. In the words of a member of the Governance Board "The fact that we work together and we see each other every month or two, helps the festivals to feel understood and heard." Through those events, the structural relationships in the Festival Organisation solidified, in the sense that members of different festivals allowed themselves to talk to each other about challenging situations. Their relationship became closer as an example by a former member of the Book Festival shows:

> During Christmas lunch, I was talking to a colleague from the art festival about a recent, not conducive, portrait of the Book Festival in the press. My counterpart from the Art Festival experienced the same and shared how she dealt with the situation. I felt less alone and was grateful to her.

Based on positive experiences like the one above the festivals increased their communication and the relationships strengthen further.

Creating a Shared Voice. In addition, an insight from one of the festival directors showed further how the design of the organisation had led to a collaborative approach. Instead of just thinking of his organisation and wanting to achieve results for it, the Director of the Science Festival established a deep understanding of the complexities of the other festivals. Reflecting on the role of the design of the organisation he said:

> One of the emergent effects of [the Edinburgh Festival Organisation] is that eleven festivals now play together. They did not use to. This is important. There is also, of course, a single coherent voice to stakeholders that is much appreciated by them and also is a more potent voice as it is for eleven festivals rather than one. The other thing is that the [Governance Board] can step in at critical times and help individual festivals. Contesting the short-term-lets legislation is a case in point where the CEO and I spent quite a bit of time supporting this when the Fringe particularly needed support.

Working Groups. In addition to the Governance Board and the Committee of Directors, the Festival Organisation decided to arrange Working Groups. The Working Groups were sub-groups (Figure 6.1) in the Festival Organisation, with their meeting schedules and agenda varying from Working Group to Working Group.

Creating Routines. The Working Groups created regular meetings and operational routines between members of staff on all levels in the Festival Organisation, fulfilling an integrative function. Through the Working Groups, the individual festivals coordinated their activities across all levels of their organisations. As can be seen in Figure 6.1, six permanent Working Groups operated within the Festival Organisation as well as four pop-up groups (blue) and three staff groups (yellow), which are specific forms of Working Groups. Each one of them

maintained a specific role and responsibility for supporting the individual festivals' understanding of the constituent festivals' missions. The Working Groups created routines that connected individuals and festivals**.**

To illustrate how the Working Groups enhanced the understanding of the individual festival for their peers I provide three brief examples based on explanations from the governance board's director. First, the Finance Working Group engaged in discussions regarding the collective use of funds within the Festival Organisation. Directors from various festivals are nominated to contribute to this working group. The members discussed their festival budgets and challenges. They enhanced their understanding of the budget and challenges of their peers. In addition, they planed how collective funds can be used towards an overarching marketing strategy or other overarching projects.

Secondly, the Programmers Working Group, comprised curators from different festivals, delved into discussions about diverse programs. Their goal was to identify potential synergies and explore how their distinct festivals can mutually benefit and learn from each other. The outcomes of those discussions materialised in collaborations, such as the joint initiative between the Children's Festival and the Fringe Festival known as the Teacher's Club. Teachers, who participated, saw different performances at the Children's Festival and the Fringe Festival.

Third, originating from the Science Festival, the Environment and Sustainability Working Group includes members from all festivals. Its focus centred on making artist travel more sustainable, exploring virtual participation, and devising strategies for reusing posters and equipment. In the Environment and Sustainability Working Group, members from all eleven festivals were encouraged to come together to discuss those topics and to develop collaborative solutions. The Head of the Environment and Sustainability Working Group told me "One contribution we are proud of is the reusing of banners and other equipment. This can in some cases be shared between festivals and it can be stored from one festival season to the next". While the festivals were very different in their programme and mission, they shared an interest in being seen as sustainable and environment-friendly. The arranged boundary around the working group helped them to step outside their daily routine to think out of the box and to collaborate on this topic.

In addition, Pop-up Groups and Staff Groups also had important operational functions. Pop-up Groups (blue in Figure 6.1) were short-term working units focused on critical issues, an example was the Visa Group, which emerged with the onset of Brexit. This group's purpose was to address how overseas artists could come to Edinburgh and perform without being

entangled in lengthy visa processes. The unique advantage here was evident for smaller festivals without dedicated HR teams, as they could leverage the expertise of HR staff members from larger festivals. Another noteworthy pop-up group, 'Digital,' explored the realm of digitalisation - an area of shared interest across all festivals. In those transient groups, collective insights and strategies were developed to navigate the challenges and opportunities presented by digital advancements.

Lastly, there were Staff Groups (yellow in Figure 6.1) designed for broader exchanges among staff members specialising in HR, marketing, sales, and development. While other Working Groups may have included staff representation based on festival size, those specific Staff Groups saw higher participation from employees. In those forums, day-to-day activities across all organisational levels were open for discussion, fostering a holistic approach to organisational missions.

Prioritising. Through the Working Groups, staff members discussed programmes, venues and target audiences. They could communicate their missions openly and topics that need immediate attention could be prioritised in a small expert group. Those groups provided an opportunity for the festivals to explain their different goals and explore ways of working that allowed them to pursue short-term goals and long-term missions without conflicting with each other. An example of this process was shared with me by a facilitator of one of those Working Groups:

> Our joint audiences group for example, which is all the marketing people across the festivals, the [governance board's] head of marketing and innovation every few years kind of takes that group through a strategy process, where they will help elicit and compile all sorts of data that they have about their audience profiles and their objectives… the objective is to kind of wind that down to work out what are the overlaps…what are the intersections between what people are interested in and those intersections then become the collective strategy that [the Festival Organisation] works on.

Results of the discussions in the Working Groups were presented at formal meetings of the Festival Organisation. Therefore, the Working Groups, comprised of experts from the constituent festivals, were strategically positioned in the design of the Festival Organisation to collectively address common challenges and pursue overarching missions.

Overall, the Festival Organisation arranged three organisational design elements to facilitate multiple missions of its eleven different festivals at the same time. Each of the organisational design elements created particular arrangements and developed buffer zones to protect

organisational interests. This allowed the festivals to follow their missions while working together on the Festival Organisation.

The Creation of Buffer Zones

Within the Festival Organisation, the eleven festivals had different temporal understandings of their processes. As shown earlier, each of the festivals had its assumptions about how a festival should be planned and the calendar year structured. In addition, as the festivals invited different performers, they had distinct planning requirements that ranged from planning horizons of a few months to four years into the future. Lastly, each of the festivals had its constraints based on their size, performers and audiences. Those different temporal understandings invariably led to tensions within the Festival Organisation.

Instead of these tensions leading to the individual festivals pushing for their mission to be followed and mission drift appearing, the Festival Organisation managed to accommodate the different interests and sustained the different missions over time. Critical to this were the four temporal boundaries created by the governance board that acted as buffer zones. Here, time periods were defined to divide the calendar year into strategic and operational periods as well as individual and collaborative projects. The buffer zones comprise a) periodic reviews of the festivals, b) operational and strategic time periods c) a five-year investment cycle, and d) formal and informal events. The consequences of these temporal boundaries for the organisational design and mission management of the Festival Organisation are summarised in Table 6.4 and then explained in detail.

Table 6.4. Buffering and its Consequences for Organisational Design and Mission Management

Temporal Boundary	*Design Element Concerned*	*Consequence for Organisational Design*	*Consequences to Mission Management*	*Case Example*
Periodic Review	Governance Board and Working Groups	Providing the Governance Board and Committee of Festival Directors with information	Holds festivals accountable for delivering their missions: Provides Committee of Festival Directors and Governance Board with an overview of individual festival missions to avoid missing or overlapping them.	Each festival has to provide a periodic review to a shared deadline, which aligns the temporal structure of the festivals for this specific task
Operational and Strategic Time Periods	Committee of Festival Directors	Creates time and space for the Committee of Festival Directors to meet	Sequences activities: Specific time allocations are provided to directors to discuss short-term and long-term issues and opportunities among the festivals.	Operational meetings are focused on short-term solutions that help the festivals to deliver their events. Strategic meetings foster a better understanding of temporal priorities and strategies among the festivals
Five-year Investment Cycle	Working Groups	Creation of opportunities for collaboration in Working Groups	Provides an opportunity to work together: Creation of stability and security for the festivals to discuss in which directions they want to develop the missions.	Five years of secured investment allows the festivals to invest time in thinking about strategies and collaborations instead of just trying to address short-term survival goals; it also establishes an important rhythm for inter-organisational Working Groups.
Formal and Informal Events	Committee of Festival Directors and Working Groups	Organisational members come together and build relationships. The Working Groups and Committee of Festival Directors profit from close ties between members.	Creates time to collaborate: Enables missions to co-exist through celebrating the diversity of the different organisational areas.	Festivals are sensitised to the different temporal arrangements of each festival. Events are organised in a way that reflects and upholds the cultural significance the festival aims to celebrate or preserve. It involves ensuring that changes, such as accommodating different temporal arrangements, are made with a clear understanding of how they align with each festival's mission.

Periodic Reviews of the Festivals. The Governance Board created periodic reviews for each of the Working Groups to further shape the existing temporal boundaries of the individual festivals, where the members of the festivals were encouraged to come together and learn about each other.

> Periodically, I guess, we have a review at the Working Groups, which is more about looking ahead and taking stock so we don't have a routinised schedule for that, but probably at least once a year. And more fundamentally, once every three years. So, it's sort of a gap analysis. (Director, Governance Board)

Those periodic reviews acted as a temporal boundary by first, creating a timeline for approaching collaborative projects and second, creating a deadline for reviewing each festival's achievements. The periodic reviews allowed for reflection on each of the festival's achievements over the year and their alignment with set missions. In addition, the periodic reviews had the same deadline for each festival. The encouraged reflection and shared deadline led to a collective understanding of time among the otherwise, very differently operating festivals. This was important for the pursuit of multiple missions as the festivals developed a mutual understanding and experience of having a similar deadline to adhere to.

In addition, the periodic reviews were also helpful to provide all festivals with a vocabulary to talk to each other. The Director of the Storytelling Festival made clear that it was important to "share [their] performance results with the Edinburgh Festival". The temporal boundary achieved through setting a periodic review deadline helped the Festival Organisation to manage its multiple missions by regularly reflecting on the position of each of the festivals to make sure that no mission was favoured over another.

Operational and Strategic Time Periods. In addition to 'periodic reviews' the structure of the calendar year into operational and strategic time periods was also important. To achieve this structure, the festivals discussed their event times and needs. This was a long process as consensual decision-making was at the core of all decisions within the Festival Organisation (Chapter 5 highlights in detail how consensual decision-making in the Festival Organisation takes place). Staff from the Governance Board emphasised many times that to achieve a good communication flow between all parties they need "a sort of a natural rhythm of the year".

> There is a sort of natural rhythm of the year because over half of the festivals take place in the summer. The sort of developmental time of year tends to be from November to about April. It is not exclusively so, but we take into account that the festivals are not going to have the absorptive capacity to run a pilot project or take part in a very big research study if we are asking them during the operational period for the majority of the festivals (Staff, Governance Board).

The Governance Board dealt with this natural rhythm of the year by establishing a temporal boundary, which defined the beginning and end time of the operational and strategic period. As such, it created a buffer zone that distinguished the operational period, where the festivals performed their shows and events, from the strategic period where the festivals reflected, prepared and planed for their next events and shows. This boundary went from April to October. During those months, the festivals had focused on delivering their core events, as a result, their main focus lay with operational issues such as securing the licenses of their venues, arranging travel for the booked artists and implementing a functioning ticketing system. In contrast, the strategic time period went from November to March. During this time the festivals focused within the Committee of Festival Directors and the Working Groups on reflections from the past festival season. During this time period, they also discussed trials of new ideas, such as approaches to ticketing or other pilot projects.

Five-year Investment Cycle. Another important temporal boundary for the Festival Organisation was the creation of five-year investment cycles. Through external funding changes as well as discussions in the Working Groups, the Committee of Festival Directors and the Governance Board, the Festival Organisation members had developed a more collaborative funding structure, which was built around those five-year investment cycles. The main driver behind the five-year investment cycle was the Platform for Creative Excellence Programme (PLACE). The programme "supports strategic development activities across the Edinburgh Festivals" (Creative Scotland, 2023). The resulting investment cycles created a set time period of five years for the festivals to work together. A staff member from the Children's Festival explained to me "We were in the red numbers each year before the calendar year was completed, there is no time to develop any long-term strategy, you just try to see how you get all bills paid".

Through the five-year investment cycle, this had changed. Small festivals had for the first time the same, stable funding structure that the larger festivals had. While the amount of funding the festivals received continued to differ from a four-figure number to a seven-figure number, the investment cycle led to more stable funding structures and increased opportunities for long-term planning involving all festivals. A member of the Governance Board explained:

> It is a mix of where the work is in terms of the investment cycle. So, we have managed to get five years of investment under the platforms for the Creative Excellence programme, which has really been the first investment that [the Edinburgh Festival Organisation] has collectively secured for community and education work. So that has provided a very important rhythm to the work of the group.

Based on the conditions of the PLACE funding the festivals needed to fulfil certain targets, including a diversified audience and collaboration between the festivals. The festivals therefore

used the investment cycles to decide what they would like to invest in individually and collectively. This is another example of how the integrative design of the Festival Organisation supported the festivals to approach tasks together, communicate with each other and develop trust that allowed them to see the perspectives of the other festivals and ensured in the long run that not one mission was seen as more important than another.

Formal and Informal Events. Formal and informal events were structured within the Festival Organisation to create opportunities to learn about and from each other. Formal events were set to bring the festivals together in specific ways to discuss items such as results from the periodic reviews. Informal events allowed networking activities and the building of closer relationships among the members of the Festival Organisation. To create formal and informal events, the governance board needed to find ways of bringing organisations together that had different obligations with their planning horizon, audiences, venues and stakeholders. This was made apparent by a staff member at the International Festival:

> We follow a global calendar. Booking a world-famous orchestra means asking them if they would like to join us three years from now.

In contrast, a staff member from the Fringe Festival told me:

> We are an open–access platform, until the day when our platform closes and we start to organise ticket sales and communications with venues, everyone can sign up. Each year we think in months not years in terms of our operation.

Formal Events. An example of formal events taking place was the meetings of the Working Groups. They decided how often they meet and how they approach those challenges. In the words of a staff member from the Governance Board:

> Working Groups will vary depending on the demands of the members of the Working Group.… usually, the frequency [of meeting] would be 5 or 6 a year, but the joint audience group since COVID have asked if they can meet monthly because they find that things are moving so fast that they found having the opportunity to check in with each other monthly was useful.

For some of them, the solution was to meet only twice a year or to communicate via email.

> There are [Working] Groups, where the staff of the festivals have at some point, felt that there would be a benefit in them having an informal network and it is one of the staff at the festivals who kind of takes the responsibility for saying, 'Oh, I am going to e-mail those guys' and we are maybe going to try and have an annual get together or sometimes they do not get together but they remain a kind of e-mail discussion group (Staff Member Governance Board)

All of the Working Groups followed a regular meeting schedule. Status updates, sending emails and talking to each other in these meetings helped establish these routines. The regular meeting

schedules also provided the festivals with a shared vocabulary based on the activities in the Working Groups and the Committee of Festival Directors meetings.

The meeting schedules established by the Working Groups became so important for the members of the Festival Organisation that they were internalised. Those established routines led to expectations by the members of the Festival Organisation about when and how often meetings would occur. One of them specifically mentioned that:

> There is a system but then once the system is in place, it is very organic. It is about, some individuals and kind of modelling behaviour, which is a sort of self-knowledge but also self-questioning…. I think having that steady pulse of communication opportunities is key.

A staff member from the Governance Board explained why it was crucial to hear from the different festivals "We are getting perspectives from those festivals that have different facets to their character". As such, the Working Groups allowed communication and consensual decision-making as well as mission alignment to happen.

Another example of creating a buffer zone to discuss common interests is the earlier introduced Pop-up Groups. The Visa Group for example discussed challenges that the individual festivals faced in supporting international artists to come to the UK after Brexit. While the festivals had different types of performers to support, they used the Pop-up Group to share best practices and ideas that everyone could benefit from. Timelines were used to provide the individual festivals with a set agenda of what had to happen at what point in the calendar year. The set timelines enabled the Festival Organisation to shape the boundaries of the individual festivals to accommodate the distinctive priorities and therefore helped to navigate and manage conflicting missions.

Finally, in the Committee of Festival Directors' meetings, each of the festival directors communicated their own deadlines and festival peak times to the other directors. This way temporal differences regarding the operation time (see Table 6.2 for an overview of festivals taking place in August and at other times) were explained in the meetings, which fostered a nuanced understanding of temporal priorities and strategies among the festivals. The different timelines of individual festival projects and the organisational structure of the individual festivals became clear and could be taken into account. The Director of the Storytelling Festival summarised the process of creating a shared understanding in this setting as a "disciplined decision-making process underpinned by everyone recognising that it is a cooperative enterprise". For example, the Storytelling Festival accepted that "there are summer festivals issues and priorities." Boundaries around individual festivals and their activities were drawn

while also encouraging collaboration between the festivals and projects that brought them together.

In addition, as can be seen in Figure 6.1, an intensified knowledge exchange among the employees from the different festivals took place through the festival Staff Groups. This allowed members of the festivals, who were not in higher management positions to learn about other festivals' goals and missions. For example, those groups allowed the members of the festivals to learn how to accommodate different goals, expectations and time schedules from the other festivals as well as to find meeting times that allowed all members to focus on a specific topic.

Informal Events. In addition to the Working Group meetings and the Committee of Festival Directors meetings, celebratory events were introduced as informal events to create get-togethers for the festivals. Those informal events were well established: each festival member knew about them. Informal events occurred at Christmas, at the beginning of Summer and other key points in the year. Those events created a buffer zone outside of each festival's routine to come together and foster a collective understanding among the festivals in the Festival Organisation. Informal events helped the festivals to see themselves as part of the Festival Organisation not just as a single festival. This was crucial for the pursuit of multiple missions. If a festival had a strong interest in driving a particular objective forward but it understood how this could harm not a competitor but a peer it would reflect and think about how it might be implemented sympathetically. As such, an overarching understanding was important for the festivals to behave thoughtfully with one another and to encourage decisions that would not harm individual members. Ultimately, this made the pursuit of different missions easier.

> We have created some moments in the last year to celebrate the community projects that have been happening through the platforms for the Creative Excellence programme and that's the only reason we had that as two separate events is because there are involved. So, you can't showcase ten [eleven] community events all in one event. So, we had two separate events to celebrate that but attended by all of the community and [the Community and] Education Working Group people, who could come, and by our founders and our City Council stakeholders and the community groups that we have been working with. So, they were giving the presentations and so on. Those were very joyful events, but in a way, they were done as part of the kind of evaluation of that strand. (Director, Governance Board)

Together, the Committee of Festival Directors and the Governance Board performed temporal boundary work by arranging time schedules, which were followed by all eleven festivals. Those time schedules built the foundation of communication and collaboration among the festivals. The time schedules supported communicating among the festivals and helped the festivals to

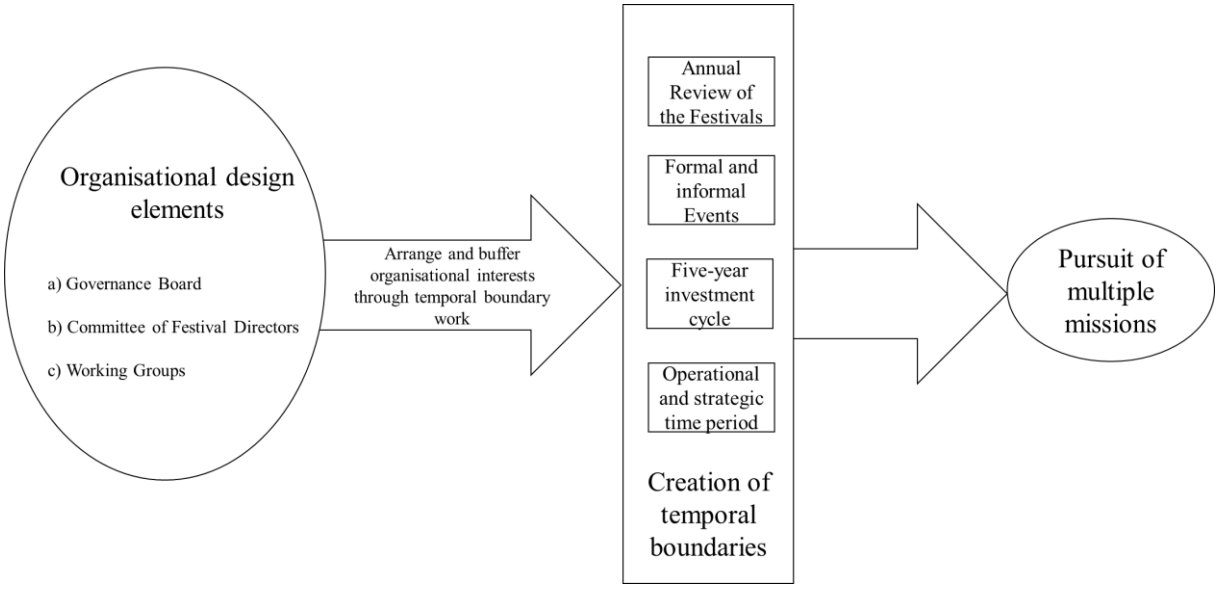
know each other's goals. This shows how temporal boundaries enabled shared interests while differences were preserved. As such, temporal boundaries acted as buffers so that the various missions of the festivals could be pursued simultaneously. In the words of the Director of the Storytelling Festival:

> Everyone has to work with that [the yearly scheduling] – it is a year-round calendar and different work strands may suit your place in the calendar better than others.... In general terms - supporting the delivery of that festival's calendar shapes [the Edinburgh Festival] work – it is a practical, not a theoretical collaboration.

The temporal boundaries functioned as a set deadline and provide the festivals with a timeline to discuss their short-term goals, purposes and ultimately their long-term missions. As a result, the festivals developed periodic reviews and investment cycles that protected their missions but also took into account the missions of their peers within the Festival Organisation. For example, through the creation of strategic and operational time periods a festival that was not performing in the summer months knew that August would not be useful to discuss long-term strategic projects as the majority of festivals would be in their peak period. The communicated temporal boundaries provided all eleven festivals with deadlines and coherent time horizons that they needed to arrange in addition to their own organisational needs. As such, the temporal boundaries created buffer zones that protected time periods that allowed the festivals to discuss their goals and purposes with the other festivals. This allowed the festivals to avoid conflicts of interest before they occurred and hence prevented mission drift from happening.

Figure 6.2 summarises how organisational missions were facilitated through the four temporal boundaries. First, Boundaries in the organisation were arranged to create the Governance Board, the Committee of Festival Directors and the Working Groups. Those three design elements focused on different structural qualities of time to help the individual festivals to accept and understand the purposes, stakeholders and audiences of their peers as well as their organisation structures from hierarchies to organisation size that allowed different missions to co-exist. Second, the members of the organisation in the Governance Board, Committee of Festival Directors and Working Groups used temporal boundary work as a mechanism to create four temporal boundaries that functioned as buffer zones to provide time for each of the festivals to work together.

Figure 6.2. Interplay of Temporal Boundary Work in the Festival Organisation to pursue Multiple Missions



Discussion

I began my study motivated to understand how organisational design can accommodate the pursuit of multiple missions. I show how accommodating different temporal demands is intrinsic to the design arrangement and the creation of buffer zones. Based on these insights I provide three theoretical contributions to the mission and boundary work literatures. First, I contribute to the mission management literature by showing how effective integrating structures and specific pacing and sequencing of organisational design arrangements are integral to the facilitation of multiple missions. Second, my study explains how an organisation with different missions inevitably has different temporal understandings, different assumptions of what must take place when, and different short-term and long-term demands at play. I provide insights into how the agency involved in creating different temporal rules allows sustainable engagement with multiple missions. Third, I connect to the boundary work literature pointing to show how temporal boundaries allow organisations to maintain tensions in a productive way that allows the pursuit of multiple missions.

The Role of Organisational Design for Mission Management

First, I contribute to the literature on mission management by illustrating how integrative structures, along with deliberate pacing and sequencing of organisational arrangements, lead to a design that encompasses all missions throughout the organisation. Recent research has concentrated on designing organisations to effectively manage mission drift by aligning missions (Pache et al, 2023; Battilana, Yen, Ferreras & Ramarajan, 2022; Smith & Besharov,

2019). This involves ensuring that no single mission becomes overly prominent and maintaining a balanced and cohesive approach. My study adds to the current literature by examining how organisations can be designed to prevent mission drift while having multiple equally strong missions at play.

I observe that highly differentiated organisations with individual missions can be brought together through an integrative organisational design. Organisational design has so far been examined in studies emphasising, on the one hand, differentiation to achieve mission management (Mitzinneck & Besharov, 2019; Santos, Pache & Birkholz, 2015). In these studies, missions are differentiated from one another by promoting their allocation to separate organisation subunits. On the other hand, integration (Smith & Besharov, 2019; Battilana, Sengul, Pache, & Model, 2015) studies have emphasised how devices such as guardrails and spaces of negotiation are created to balance different missions at play at the same time. I add to existing understandings of mission management by showing that it is not the existence of particular differentiation and integration structures that allow multiple missions to co-exist, but instead, the precise sequence and pace in which they deliver their activities and the organisation's responsiveness to change that is of importance for an equal facilitation of multiple missions.

Firstly, the ongoing prioritisation of missions is entrusted to an independent board with a neutral perspective. This overarching board consistently evaluates and sets the priority of missions, giving precedence to those relevant to all organisational members. Being detached from individual missions, the board offers impartial guidance, serving as a crucial initial step to forestall mission drift. The independent advice, along with the recommended order of missions, establishes the framework for subsequent discussions within the organisation. This approach fosters clarity and mutual understanding among all stakeholders.

Secondly, a commitment to ensuring equal attention is given to each mission is accepted by all stakeholders. Detailed discussions on these relevant missions take place within committees and working groups, utilising consensual decision-making processes. This ensures that each mission receives equal consideration, preventing any organisational member from unduly elevating the importance of their specific mission. Through these deliberative processes, organisational members collectively cultivate a comprehensive understanding of the diverse missions facilitated within the organisation.

I suggest that, unlike organisations with a single mission (Battilana et al., 2015), the presence of multiple missions leads to a significantly higher diversity of perspectives and prolonged

decision-making processes. However, this diversity does not necessarily result in mission drift. By prioritising and treating missions equally, potential conflicting interests are identified and addressed proactively, preventing complications down the line.

Moreover, I examine the inclusion of a variety of missions from the outset fosters a heightened awareness among members about the necessity for ongoing communication regarding diverse approaches and ideas. This open dialogue ensures that no single mission is favoured over another, and any tensions arising from diverse missions are addressed directly. My study therefore emphasises that to pursue contrasting missions within the organisation that may entail goal conflicts, it is important to be able to allocate resources so that individual missions can be addressed promptly. As discussed above, the needed responsiveness can be provided through the organisational design arrangements and the way in which activities are first sequenced and then paced. This approach not only prevents mission drift but also encourages a collaborative and communicative environment conducive to the successful management of multiple, potentially conflicting, organisational missions.

Further, to manage multiple missions over longer periods of time, Pache and colleagues (2023) assume that organisational members need to be knowledgeable about the missions of other departments while simultaneously working on distinct missions to drive the organisation forward (Pache et al., 2023). My findings extend this by also demonstrating how organisational members use distinct time-periods for meetings with a focus on the organisation overall and separately for meetings with that a directed at specific missions. In doing so, organisational members become not only knowledgeable about different missions in the organisation but also discuss the different missions and bring in their perspective during processes of consensual decision-making. By distributing activities to focus on topics relevant to all, each organisational member can still bring their distinct mission to the meeting. In this way, I extend other studies that emphasise the importance of one mission being held solely in one sub-unit (e.g., Pache et al., 2023, Battilana et al., 2015).

Consensual decision-making goes beyond Battilana and colleagues' (2022) work on democratic organisation practices to manage multiple missions because consensual decision-making allows each organisational member to veto if they do not agree with something. In my study, this leads to an increase in trust and understanding for other organisational members through arranging cross-departmental groups, allowing members of the organisation to maintain a keen awareness of the distinct tasks approached by each sub-unit. Through the observed creation of cross-departmental groups I add to Battilana et al.'s (2022) call to find additional ways in which

workers can represent their organisation. The cross-departmental groups provide a space for diverse organisational members with different missions to come together and discuss individual challenges within the organisation. The members of the organisation learn about the missions of their peers and develop an understanding of different approaches within the organisation to achieve these missions. For instance, in my study Working Groups are divided by topics of interest such that organisational members who feel strongly about a topic or have a responsibility for it, can join the Group to develop innovative ideas and solutions. In this way tensions can be dealt with on a continuous basis.

My study further sheds light on board and committee structures (Pache et al., 2023; Serres, Hudon & Maon, 2022) by discussing an alternative approach to a democratised board or committee structure (cf. Battilana et al., 2022). I show the importance of a rotating chair position providing each board member with the experience and challenges of the chair position, which diversifies the responsibility for and understanding of the requirements of sustaining the pursuit of multiple missions. Every two to three years a different organisation head takes the lead and becomes chair. As a result, the understanding and trust between Committee members grows because they all experience how it is to think about the organisation overall. The individual committee members do not blindly favour one mission over another but listen to their peers. This influences the behaviour of their staff. By observing how decisions are made and different goals and interests understood and moderated, members of other hierarchical levels become more open to collaborative approaches. The Committee of Festival Directors is therefore also important for organisational members participating in the decision-making process of cross-departmental groups.

Overall, the Festival Organisation employs a highly integrated structure utilising a Governance Board, a Committee of Festival Directors, and Working Groups. Unlike some studies (e.g., Pache et al., 2023, Battilana et al., 2015) that advocate allocating a single mission to one sub-unit and balancing the missions so that they do not become contradictory, I show how effective integrating devices and specific pacing and sequencing of organisational arrangements, creates a design in which all missions are considered throughout the organisation.

Mission Management in Organisations through Creating Buffer Zones

My second theoretical contribution reveals how an organisation with diverse missions requires distinct temporal understandings, varying assumptions regarding the timing of events, and diverse short-term and long-term requirements. I offer insights into how organisations can create buffer zones, which can facilitate distinct temporal rules and ultimately encourage the

facilitation of multiple missions. Organisations often operate on multiple time scales and have different temporal requirements (Jarvenpaa & Välikanga, 2022). For example, different projects may have distinct deadlines, and various departments may follow separate timelines. Temporal boundary work involves managing these diverse temporal aspects effectively.

The process of creating buffers is deemed necessary to "protect parts of the organisation from a chaotic barrage of outside influences" (Lynn, 2005:5; Jan & Louis, 1999). Building on this, I delve deeper into the concept, highlighting how buffer zones contribute to managing organisational missions. Buffer zones, by allowing precise time allocation, serve as a strategic tool for protecting the missions of individual organisational members and groups. Through the setting of time-periods, these zones enable focused attention on specific missions, independently managing conflicting demands. This approach not only safeguards diverse objectives but also facilitates quick adaptation to change within the organisation. In contrast to concepts like relational spaces (Kellogg, 2009) and spaces of negotiation (Battilana et al., 2015), which foster ongoing interactions and relationship-building, buffer zones emphasise managing time to address specific, equally strong missions, providing a structured framework for effective organisational responsiveness.

I also explain how individuals and groups are facilitated to convene and discuss their missions through buffer zones. Buffer zones allow for the accommodation of multiple temporal rules, as organisational members are not permanently isolated from their organisation or subunit. Instead, time-periods are deliberately allocated to focus on particular topics. As such, buffering allows organisational members to sustain their competitive and collaborative behaviours (Guston, 2001). Remarkably, in my study, this does not take place to develop short-term arrangements as with Guston's (2001) politicians and scientists developing policy documents, but is a continuous practice. For instance, the Festival Organisation has accomplished long-term arrangements for over 19 years by dividing the calendar year into strategic and operational time periods. The organisation decides regularly if different buffer zones need to be created or existing ones need to be changed. This example demonstrates how buffer zones serve as a temporal zone for targeted discussions and collaborative problem-solving, enabling the organisation to navigate diverse issues within structured time frames. This is particularly important in organisations where multiple missions are at play and collaboration across various functions is essential for success.

Furthermore, I show through the concept of buffer zones how interactions in organisations are managed when external timelines play a consistent role in shaping routines and organisational

members. I thereby add to Geiger and colleagues (2020) study on temporal boundaries in emphasising buffer zones as an additional factor that influences organisational routines. Organisations can strategically position buffer zones where they are most needed to ensure that temporal boundary work is effective and aligned with overall organisational objectives.

As my research has demonstrated, different organisational members are likely to have different assumptions and concepts of time. In organisations with different missions, there are inevitably different temporal understandings, different assumptions of what must take place when, and different short-term and long-term demands. I show how the agency involved in creating different temporal rules allows sustainable engagement with multiple missions.

Temporal Boundaries as an Important Device for Mission Management

My third contribution is to the boundary work literature by extending our understanding of temporal boundaries. As I have shown, temporal boundaries allow organisations to maintain tensions in a productive way that allows the pursuit of multiple missions. Different organisational members are likely to have different assumptions and concepts of time (Yakura, 2002). In organisations with different missions, there are inevitably different temporal understandings of time, different assumptions of what has to take place when, as well as different short-term and long-term requirements and time constraints at play. Thus, different organisational areas follow different time horizons, project deadlines and work with different clients. That is, they have different "temporal rules" (Jarvenpaa & Välikanga, 2022). Different temporal rules are especially problematic if organisations focus on long-term commitments. By observing how diverse organisations work together in the long run, I extend the work of Stjerne et al. (2018) who look at collaboration in short-term, project-based organisations.

Different understandings can collide and create challenges in cooperation and coordination which can lead to mission drift. In my study, temporal boundary work is used as a facilitator to moderate between different temporal rules. It can help to establish routines through set meeting times and shared deadlines. In doing so, organisational members and their organisations are held accountable to meet regularly. For the festivals, it is not only project goals but their individual missions that are affected and temporal boundaries are used to achieve these goals in the long run. My study therefore provides insights into how challenges around temporal structures leading to high degrees of conflict (Bansal et al., 2022) can be overcome and as such the favouring of one mission over another, which could have led to mission drift. The key here is temporal boundary work that allows organisational members to reconcile competing missions

and understand constraints and requirements in the context of ongoing and distinct temporal pressures.

The created temporal boundaries help to facilitate meeting times and project timelines for which all organisational members can be held accountable. As such, established temporal boundaries strengthen an organisation by enabling its members to communicate with one another and discuss differences and similarities (cf. Langley et al., 2019). Further, my study emphasises the significance of addressing temporal boundaries to provide members of an organisation with a tangible vocabulary for discussing short-term goals and long-term missions. This, in turn, initiates the formation of relationships between organisational members, ultimately facilitating the pursuit of multiple missions more effectively.

In conclusion, organisations, utilise varied temporal rules to manage diverse temporal requirements. (Jarvenpaa & Välikanga, 2022). Rather than focusing on resolving tensions as existing theory suggests (e.g., Battilana et al., 2015), I theorise that effective temporal boundary work allows these tensions to be maintained in a productive way that allows the pursuit of multiple missions.

Practical Implications

My study provides organisations with insights into how the pursuit of multiple missions can be achieved. First, there is a need for the creation of regular, cross-functional meetings where all members are understood as equal. These meetings can increase communication between organisational members, lead to a better understanding and tolerance of one another and as such decrease the risk of mission drift. In contrast to agile working conditions like sprints, regular meetings have the advantage that the focus does not have to be set on one mission only but can be diverted to accommodate different missions. I have observed that to achieve this the order of topics that need conversation as well as the time spent on each of these topics needs to be moderated. Important here is an arms-length moderator that all organisation members accept.

Second, an organisation that aims to accomplish multiple missions should reflect on its review mechanisms. If organisational members come regularly together in different meetings, a constant flow of communication is created, which leads to a steady feedback loop. In this case, organisational members do not focus solely on a specific mission and hence increase their likelihood of successfully managing multiple missions simultaneously.

Finally, in contrast to managers consistently monitoring organisational members and units, my study has shown that temporal boundaries establish a routine that members can autonomously follow. This not only enhances communication among members but, once the routine is well-

established, allows them to naturally collaborate on important and intersecting topics. Each organisational member has the opportunity to bring their mission to the meeting, promoting balanced participation. This inclusivity can lead to more engaged and committed teams.

Future Areas of Research and Boundary Conditions

This research reveals certain boundary conditions that offer avenues for future exploration. Drawing inspiration from Eisenhardt's (1989) foundational work, I frame my case study as a further step in the advancement of theory within mission drift. I urge scholars to conduct additional research on mission management in organisations with a focus on three main areas, temporality, boundary work and history.

Research on time and temporality has increased over the years and the call to study the importance of time for collaboration in organisations has been raised (Bansal et al., 2022) while some promising work is analysing the impact of different temporal understandings (Jarvenpaa & Välikanga, 2022) in shaping collaboration or conflict. As shown in my study, some missions may be cyclical, responding to recurring patterns or challenges. Understanding the cyclical nature of an organisation's context helps shape a mission that is responsive to changing conditions over time. More work is necessary that builds on these insights to better understanding the pursuit of multiple missions.

Research on mission drift has focused on the organisational structures of organisations, their members (Battilana et al., 2022 and 2015), and their boards (Pache et al., 2023). While my study explores boundary work as part of the organisational design arrangements, there is more work to be done to examine the role of boundary work in the creation of integrative structures that allow multiple missions to flourish. It would be interesting to further examine how boundary work helps to define and delineate the boundaries of organisational missions. Furthermore, a question around the role of boundary work lies in defining how resources are allocated among different missions. This could involve examining how power is shared and mechanisms implemented to ensure fairness and transparency in the distribution of resources.

Another interesting focus would be on the increased ability of organisations to manage multiple missions if they have a fast crisis response. Members of the Festival organisation described to me their remarkable response to the Covid-19 pandemic as well as to the fall into administration of the Film Festival. The ability of the Festival Organisation to quickly shift their focus and adapt to changing environments has been proved important to survive and seems to also be an important skill that comes with the knowledge of how to manage multiple missions. Further studies could look into the relationship of crisis response and mission management.

Finally, my study had historical foundations that I could not observe in detail but that are nonetheless important and interesting. Thus, an avenue for future research could be the role of organisational history in the emergence of integrative design elements. While work has looked into the role of organisational identity in regards to missions (Smith & Besharov, 2019; Battilana et al., 2017) the history of organisations and their subunits is also relevant for understanding how organisations may be designed to pursue multiple missions. For example, historical missions, especially those deeply ingrained in an organisation's founding principles, can exert a lasting influence. The vision and values of past leaders often shape the mission (cf. Fey & Amis, 2023), and subsequent leaders may feel a responsibility to uphold or modify the mission based on the historical legacy.

Conclusion

Mission management poses a significant challenge for organisations. Understanding how organisational design can support an organisation in pursuing multiple missions within an increasingly complex environment can, therefore, be important for an organisation’s survival. Rarely can organisations achieve success by focusing solely on one specific mission; often, they need to be diversified and adaptable to respond to changes both within and outside their structures. My findings increase our understanding of the role organisational design can play in enhancing an organisation’s ability to pursue different missions simultaneously, enabling them to better accommodate diverse demands. I have shown the importance of arranging an overarching board, working groups and a committee of directors to create an organisational structure that allows multiple missions to be pursued. I further extend research on temporal boundaries by highlighting how organisations can pursue multiple missions while different temporal rules are at play. The use of temporal boundary work by members of Festival Organisations highlights the impact that thoughtful time management and boundary setting can have on an organisation’s mission management. Therefore, it is imperative to consider organisational design and time together.

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CHAPTER 7 - CONCLUSIONS

My thesis explores the role of how organising influences outcomes in different organisational arrangements. I asked myself 'how organising influences outcomes?' and I addressed this question by exploring how organisational design and its structures impact organisational success by providing an ability to collaborate and compete. Applying a boundary work lens, I provide a more dynamic understanding of how organisational design takes place. I show how organisational design is enacted and how interactions between structures and practices look like. In my thesis, I have shown how organisational structures can influence organisations in negative ways (Chapter 4) but also how organisational structures can generate lots of excitement and provide ideas for collaborative organisational approaches (Chapter 5 and Chapter 6).

Through my studies I discovered how boundaries emerge in organisations and how they can be used to bring individuals, teams and organisations together, but also how to keep them apart. I uncovered how important reflections on the roles of organisational design are for anyone in a strategy focused position, from academics to employees and managers to board and committee members. For example, questioning an organisational design that fosters competition within an organisation is important to distinguish if a positive case of inspirational competition (Chapter 5) is taken place or if fierce competition takes place in the organisation, which can lead to the build-up of socio-cognitive boundaries. Socio-cognitive boundaries can act as a filter for justifying illusory practices without them being questioned (Chapter 4).

In addition, I add complexity to the study of boundary work in showing that organisations do seldom focus on one category of boundary work. Most of the times, different categories of boundary work are intertwined. Chapter 4, Chapter 5 and Chapter 6 show how organisations reflect and develop from their past to be more adaptive and future ready in the present. They achieve this through a more nuanced understanding of their organisational design and its consequences. It is with the importance of reflections in mind that I address my research questions tackling how organisational design can facilitate competition as well as collaboration. I explore my research question in three distinct chapters, which focus on the role of organisational design by analysing a competitive organisational design (Chapter 4), examining a new, collaborative type of organisational design (Chapter 5) and engaging in the role of organisational design in preventing mission drift (Chapter 6).

Theoretical Implications

In Chapter 4, I explore how organising through competitive boundary work can lead to strong socio-cognitive, vertical, and horizontal boundaries, which can encourage wrongdoing to take place. Based on my findings, I suggest that the conditions that led to organisational wrongdoing are not unique to this organisation and thus wrongdoing is likely to emerge in any organisation characterised by similar internal boundary arrangements.

In Chapter 5, I study how competitive and collaborative boundary work can take place simultaneously in an organisational form. I defined the features and performance challenges of 'the Festival Organisation', and the mechanisms that underpin how those challenges can by successfully addressed. The organisation consists of several constituent festivals of similar status complemented by a flat hierarchy, fully inclusive representation, and consensual decision-making. These structural arrangements address two of the distinctive challenges that confront the festival organisation: to encourage its constituent festivals to compete for venues, sponsorship, policing and so on, in order to attract performers, because only by attracting performers will a festival attract an audience; and to secure collaboration across the boundaries of the festivals in order to gain both strategic and more mundane benefits. Competition and collaboration are central to achieving high levels of performance.

In Chapter 6, I examine how the Festival Organisation navigates the competing demands of multiple missions. As observed in other forms of organisation, balancing diverse and often conflicting missions is not easy. I found that the festival organisation uses a specific type of configurational boundary work called 'temporal boundary work' to allow different missions to co-exist. I elaborate on how this can be achieved in an organisational setting and how it can be sustained by the Festival Organisation.

While each individual chapter makes distinct and novel contributions to our theoretical understanding, the collective insights on organising when considered together are especially compelling. While organisational structures provide an outline for how an organisation should function, the way how the organisation works is realised through the establishment and management of boundaries within that structure. The relationships, interactions, and collaborations that occur within and across these boundaries bring the organisational design to life. In my thesis, this becomes evident by examining how various categories of boundary work impact the development of organisational structures and, consequently, the organisation's capacity to address challenges and adapt. Organisational design that encourages departments to work isolated on desired outcomes that can contradict each other encourages competitive

boundary work. Boundary work as the purposeful action of individuals, teams and organisations can change the appearance of an organisation to a great deal, however, the organisational design influences how boundary work takes place and what positive and negative consequences it can have.

At the same time competitive boundary work reinforces the compartmentalised organisational structures that have led to competition in the first place. In Chapter 4, I have theorised how organisational design in combination with competitive boundary work can lead to silo thinking but also how a change in organisational design through flatter hierarchies and collaborative boundary work can actively break down silo thinking. In Chapter 5, I have shown the shift from a mainly competitive environment to a more collaborative environment through organisational design as well as a combination of competitive and collaborative boundary work. The combination of these two types of boundary work leads to the achievement of inspirational competition, which aims to achieve success for all parties involved but at the same time also inspires everyone to give their very best. These theoretical insights broaden or understanding of the connection between organisational design and boundary work, if we see boundary work and organising together, we are looking at two sides of the same coin. To gain a comprehensive understanding of how an organisation operates and adapts, it is crucial to consider both boundary work, which involves managing interactions and relationships among organisational members, and organisational design, which influences the internal structure and arrangements that unite organisational members. Organisational design and boundary work are interconnected and contribute jointly to the overall functioning of the organisation. It is therefore of importance that we do not only study organisational design or boundary work but understand them in relation to each other.

In addition, my thesis has further shown the importance of time and space for organising. Time and space influence organising through shaping the context and dynamic of organising but also the mechanisms of organising itself. By incorporating time and space into my analysis; I developed a deeper understanding of especially the why and how organising takes place. Focusing first on the contextual aspects of time and more precisely temporality, I developed a detailed understanding of the evolution of organisational structures, for example in case of my longitudinal study of the Festival Organisation and its development over the past 20 years as I show in Chapter 5. The importance of temporality also becomes clear, when analysing how organising takes place in the organisational settings I am examining. For instance, to achieve collaboration between organisational members it can help to divide the organisational year in

strategic and operational time periods. This can help especially heterogeneous organisational members with different temporal rules to work together (see Chapter 5 and Chapter 6).

Considering the importance of space, in each of my studies (Chapter 4, 5 and 6), space becomes visible through the significance of the location, proximity of organisations and departments as well as infrastructure and regional advantage it can support. In Chapter 4, I stress the significance of the spacial division within the organisation, which led to organisational actors not talking to one another as they simply did not get in contact with each other. In opposition to this negative example, the spacial closeness of the organisation portrait in Chapter 5 and 6 does not only imply that its members see each other regularly, but through the geographical proximity the outcome of their organising is very much visible to other organisational members. It influences the organising of the other organisational members involved. Overall, time and space are important mechanisms for the competitive, collaborative and configurational boundary work I observe in my thesis.

Another valuable insight from this thesis is the way in which organising affects society and vice versa. Organising, as shown in Chapter 4 to Chapter 6, can have unpredictable consequences that reach beyond the organisation itself. In Chapter 4, employees, managers as well as customers reflect on what they have associated with the organisation and how the organisation should be seen in the future. The change of perception as well as the changing demands in society led to a new organisational design. For Chapter 5 and Chapter 6, longer shifts in society, from a clear distinction between high and low art to a democratisation of art have also influenced the organisational design of the Festival Organisation that incorporates many different art forms in their organisational form. At the same time, the organisation aims to push the boundaries of its audience through the performances they show. They try not to be put into a specific box but encourage their audience to think and reflect on what art means to them.

Practical Implications

I have shown in my thesis that organising is important for organisational outcomes and, hence, societal implications. For instance, after the Covid-19 pandemic and societal isolation organisations are needed to create a sense of identity and social connection between individuals and to encourage conversations across different political and social positions (Amis & Greenwood, 2021; Staggs & Wright, 2021; Sadeh & Zilber, 2019; Schüßler & Sydow, 2015). Through the conversations with practitioners about my findings and the current economic developments I believe that my insights can help policy makers in encouraging inclusive

organisational settings where the role of organisational structures is better understood and applied to initiate social cohesion.

Based on my thesis several implications can be made for practitioners, especially policy makers and managers but also other organisational members, who are involved in strategic activities. In terms of designing an organisation, my insights from the wrongdoing at VW and the success of the Festival Organisation are particularly useful for practitioners in three ways. First, I have shown that it is important to think of the consequences of an organisational design that strives to achieve growth through compartmentalisation and competition. I have demonstrated that the ways individuals and teams think can become isolated and can trigger justifications of wrongdoing. Allowing for communication between individuals and departments that also include conversations about failures and problems. As a positive example, the Festival Organisation shows how communication together with trust between actors can lead to learning and improvement of each of the actors involved. Depending on the specific context, this might involve initiating projects were different departments work with each other on a common goal, so that competition is overcome, and relationships are built between the parties involved. This is important to overcome silo thinking and hinder organisational wrongdoing and competition from arising.

Second, while developing policies around funding and future strategies it is important for organisational leaders and funders to overthink the design of these policies. Setting desired outcomes that are not achievable or that lead to sever competition between parties can have a negative push-back effect. My insights from chapter four are applied to the MBA teaching at University of Edinburgh where students are taught about how specific organisational design choices can lead to wrongdoing. It is therefore important to understand how goal setting can be used in ways that foster collaboration. Goal setting can initiate working together, for example, if funding arrangements ask organisations to show a heterogeneous portfolio that they can only achieve through collaboration with other organisations. This can positively influence relationships between these organisations and even initiate long-term collaborations to develop. In addition, my theoretical framework in Chapter 5 shows how policy makers and organisational leaders can use geographical and temporal proximity between organisations in their local domain to initiate conversations and incentivise collaboration. For example, if organisations are geographically close to each other they can have in-person networking events and meet to discuss local challenges from recruiting to infrastructure. This in return provides the city council with a better understanding what organisations in their area need. If the

organisations have similar peak times, this can also be used to invite organisational members to collective reflections after or before their peak time. Creating a sense of community and lasting learning effects for the organisational members as well as the city council.

Third, while it is important that managers and policy makers understand the role that organisational design can take in initiating competition and collaboration it is also crucial for organisational members in ever day activities to be aware of the influence organisational design can have on them and vice versa. In this thesis, I have shown that the thinking of individuals in organisations matters. One of the first things VW did after the emission scandal was to strengthen the voice of the individual through workshops and events so that employees would speak up, say their mind, and point out wrongdoing when it happened. The Festival Organisation also set on hiring people with a collaborative mindset and in many examples between the organisations it was the employees that knew each other and helped each other out with problems regarding ticketing issues or staff shortages. By assessing the appropriateness of the organisational design by members of the organisation that are not in higher management positions they can show flaws that become apparent in the everyday life but not in a board meeting.

Reflections

The reflections of this thesis are personally meaningful to me. I aim to learn from them for my future academic career. All understanding of my research is partial. In my thesis I examined the role of design in two specific settings bounded by a) time, b) resources, c) methodology and d) theorising.

In retrospect I would like to dive deeper in both of my empirical contexts. In terms of time and resources, my data sets have been collected during my doctoral programme and as such are bound to three years. By drawing on archival documents and a personal account I have aimed to address these shortcomings. Regarding Chapter 4, the data set is based on newspaper articles, annual reports and my personal account. I would like to conduct interviews with employees to capture what happened after I left and how the organisational design and their daily routine changed in practice. I would like to understand if there are additional learnings for the organisation to not only change their design, but also to use design elements that change competitive behaviour in the long-run in the organisation so that organisational members do not fall back to old habits.

For Chapter 5 and Chapter 6 I have been able to collect archival data that goes back to the 1940s. Many interesting questions came up in my data collection that I was not able to explore for now. For example, the Fringe Festival follows a very different organisational design than the other festivals. It is also the festival that grew the most over the past eighty years. I would like to look further in this phenomenon and understand how the growth of the festivals took place and why the design of the organisation differs so greatly from the other cultural festivals in Edinburgh.

Focusing on my role as a researcher, all three chapters of my thesis have in common that I am new to academia and that I examine the role of organisational design based on my experiences and understanding of the context. Coming from an industry background and an education solely in business schools, many of my questions were framed based on vocabulary fitted for a corporate organisation but not the cultural organisations I was interviewing for most of my doctoral programme. I had to learn the language of my interviewees and also emerge myself in the context. While I worked at VW for nearly six years and I had developed a good understanding of the organisation and its context through this time, I did not have this advantage for the Edinburgh Festivals. Now, in my fourth year, I feel like I am understanding the context in more detail, but this is only at the end of my doctoral programme. While my background has allowed me to raise questions about the role of the organisational design on a meso- and sometimes macro level, I have not explored the micro perspectives of individuals, which might have hindered me from exploring other perspectives than what I have studied.

Reflecting on my methodological approach, I have been using two single case studies to understand the role of organisational design. Both cases are specific, and the applications of the findings can be questioned as discussed by Langley and Abdallah (2011). While I was able to consider contextual factors through using different types of data, I might have not developed findings that are generalisable to any organisational setting. However, through focussing on a multinational corporation and a heterogeneous cultural organisation, I believe that I have shown the role of organisational design in different organisational settings and some learnings can be applied elsewhere. The focus of my study was on the role of organising and I have shown a positive and a negative example of how organising can influence organisational actors and ultimately the organisation overall. I therefore firmly belief that my findings offer novel insights that are of use outside of the two organisational forms I have studied.

Another reflection from my methodological approach is that I applied the theoretical concept of boundary work to two different empirical settings. I therefore confine the empirical

phenomena of my research (cf. Collins & Stockton, 2018). I apply assumptions and belief on my research setting (Maxwell, 2013), a boundary work lens helps me as I find my epistemological and ontological understandings reflected in this theoretical framework, however it also frames my research question and the interpretation of my data in ways that lead to bias of myself as a researcher and assumptions of similarity of the research settings that might not be shared by other researchers or practitioners.

Future Research

At its core, my thesis is driven by how organising shapes the outcomes of organisations. My thesis has shown that organisational structures can influence organisations in positive and negative ways. My work opens up several routes for future research. I am intrigued by questions such as: What roles does organisational design play in shaping organisations? How do organisational structures impact interactions between organisations and their members? Moreover, what actions can individuals, groups, and organisations take to create structures that address contemporary challenges, such as promoting flexibility for workers, adopting sustainable approaches to the environment, and fostering responsible profit generation?

While organisational scholars have focussed on studying different organisational forms (Slade Shantz, Kistruck, Pacheco, & Webb, 2020; Hinings & Meyer, 2018) with a focus on the differences between organisational designs as well as their ability to innovate and collaborate my work has reinforced the need to do so over a longer period of time. As of yet, little management research has looked into the long-term outcomes of organisational forms (Mintzberg, 2023) and their engagement with societal challenges (Schüßler, Lohmeyer, & Ashwin, 2023; Gümüsay, Claus, & Amis, 2020). We do not know, therefore, whether such organisational designs will be useful for facing grant societal challenges and how the relationship between economic and social impact will develop.

We lack insights into the factors that lead to the adverse consequences of organisational arrangements. Future work might focus on examining organisational design and practices mainly within organisations, my work goes beyond this scope. In my thesis, I am exploring how organisations can discover new forms of organising by leveraging intra-organisational relationships and developing a more detailed understanding of the outcome of their organisational design.

In my thesis, I have shown that organising plays a crucial role in managing and leveraging organisational boundaries effectively. Researchers can examine the design choices

organisations make to create boundary-spanning mechanisms, such as formal structures, virtual teams, strategic partnerships, and open innovation practices. By examining the relationship between organising and boundary management, we can identify best practices and propose frameworks that enhance organisations' capacity to respond to complex, interconnected business environments. The first tangible result of this effort is Chapter 6 in which I explore time as a mechanism to foster mission balance in an organisational setting driven by multiple missions.

While my thesis has focussed on specific geographical contexts, the role of place (Wright, Irving, Zafar, & Reay, 2023) was not further elaborated in my study. I believe it would be interesting to explore the role of place in relation to the development of an organisation. For example, exploring the boundary-spanning activities, collaborations and strategic alliances that organisations employ to navigate challenges and opportunities presented in their geographic context. Exploring how organisations establish, manage and modify their boundaries in relation to their geographical context provides new insides into how organisations define their scope and interactions with their external environment.

Another avenue for future research relates to the importance of temporality in relation to mission management, which I developed as part of my studies (Chapter 6). Temporality might be used by researchers to study the management of competing short and long-term demands in more detail. Temporality may serve as a valuable addition to mission management studies. This stream of research could be particular interesting to explore its role in driving innovation and motivation within different organisational settings. This line of inquiry has the potential to contribute meaningful insights and practical strategies for leveraging multiple missions in ways that inspire and elevate organisational performance.

I urge scholars to further explore my research on organisational structures and boundary work in the realm of organising. Enhancing our understanding of the role of organisational design can offer specific guidance for managing challenges related to organisational change and societal grand challenges. I hope that the findings of my thesis will prove valuable for both academics and practitioners involved in organisational design and change.

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