

Rotterdam School of Management
Erasmus University

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A lot to lose

Organizational identity
and emotions in
institutional contexts



Propositions

attached to the thesis

A LOT TO LOSE ORGANIZATIONAL IDENTITY AND EMOTIONS IN INSTITUTIONAL CONTEXTS

Christina Langenbusch

Erasmus University Rotterdam
02 April 2020

I

Organizational identity resides in different loci and can create value. It can also act as a hindrance to change and consequently destroy value.

II

Defining an organizational meta-identity makes it possible for an organization to adapt to a broader set of situations in ways that are still authentic to the organization.

III

There is a need for a new breed of consultants who support organizations in similar ways to those in which psychologists aid individuals, supporting organizations to steer their organizational identity in the direction of greater value creation for all stakeholders.

IV

In the grand societal challenge of forced displacement, the sensemaking and coping behaviors of individuals on the ground depend on the role identities they hold within the setting.

V

Paradoxical contexts are associated with the triggering of ambivalent emotions. Coping with such ambivalent emotions can create new paradoxical contexts which the copers and those around them have to cope with once more.

VI

The permanence of the emergency situation in the Moria hotspot, the complexity of forced displacement and the immediacy of the suffering of refugees create massive costs in the form of secondary trauma for multiple stakeholders.

VII

If researchers' emotions are considered reflexively and with caution, they can be valuable for theory development, leading to theories with increased practical relevance.

VIII

Engagement with emotions can be a tool for better academic work and should be accepted as a legitimate means for improving research.

IX

A “settled emergency” is associated with an unbearable situation that is perpetuated and static. It is composed of a circle of blame, the profiteering of stakeholders and a fear of punishment if its fundamentals were to be challenged.

X

The “settled emergency” on Lesbos could be a threat to Europe. If an organization disregards the agreements it has made and values it has developed, it could inflict its own death blow. A great deal more than “a lot” could be lost.

XI

The problems of this world are only truly solved in two ways: by extinction or duplication.

– Susan Sontag

A LOT TO LOSE

**ORGANIZATIONAL IDENTITY AND
EMOTIONS IN INSTITUTIONAL CONTEXTS**

A LOT TO LOSE
ORGANIZATIONAL IDENTITY AND
EMOTIONS IN INSTITUTIONAL CONTEXTS

VEEL TE VERLIEZEN
ORGANISATIE IDENTITEIT EN
EMOTIES IN INSTITUTIONELE CONTEXTEN

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To my family

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List of Abbreviations

EU	European Union
GO	Governmental organization
I	Interviewer
ID	Identity
ISI	Institute for Scientific Information
MSF	Médecins sans Frontières
NGO	Non-governmental organization
OI	Organizational identity
R	Respondent
SSCI	Social Sciences Citation Index
TSO	Transnational security organization
UNHCR	United Nations High Commission for Refugees
WEF	World Economic Forum

Chapter 1

INTRODUCTION

*The people at the bottom do not have the larger, global view,
but at the top they do not have the local view of all the details,
many of which can often be very important,
so either extreme gets poor results.*

– Richard Hamming

How do grand societal challenges manifest locally? How do they affect individuals and organizations? Can organizations create value with their identity? And how do identity and emotions play into this? Is dealing with questions of identity and emotions worth the time and effort in an optimization-driven world? This dissertation provides new insights into these questions, which were inspired and steered by local views from practice and academic curiosity.

1.1 Identity and value creation

The starting point of this dissertation was my academic curiosity. I worked in business after I left academia with my Master's degree and discovered that theoretical concepts cannot always be implemented in practice. Conversely, science

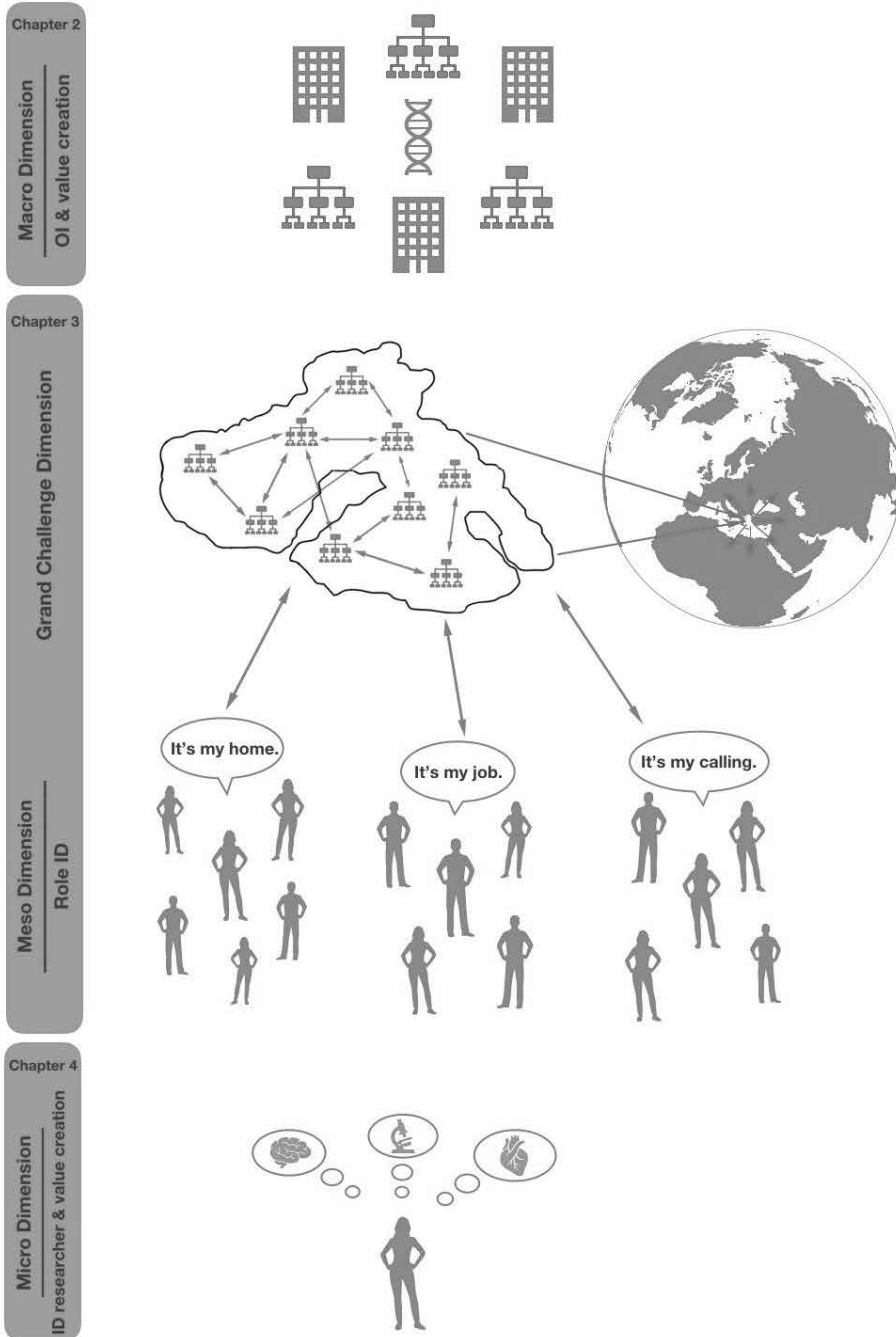
already provides useful answers to various practical challenges that do not reach practical application.

On an individual level, questions of identity are always present: Who am I? Why am I here? These questions have countless dimensions and, in the context of work, quickly lead to questions like: Why do I do what I do? and: Why am I working in this particular organization? As life is understood in retrospect, it makes sense that I worked in a consultancy that used an organization's identity as a starting point for strategical development of organizations. Practicing this approach created the wish to get to the bottom of the subject on an academic level, and so my PhD journey began.

First, I investigated the connection between organizational identity (OI) and value creation, starting with a systematic literature review (Chapter 2). The first surprise was the abundance of existing literature on OI following the seminal article of Albert and Whetten in 1985. OI naturally focuses on identity *within* an organization. In the following, empirical chapter (Chapter 3) the focus is expanded to a comparison *across* not just several organizations but numerous types of organizations with different forms of organizing. The questions mentioned above – Who am I? Why am I here? To create what? – naturally touch upon issues of sensemaking. After a long process of data analysis, my co-authors and I also touched upon topics related to identity, value creation and how people make sense of the global grand challenge of forced displacement. It turns out that, in this context, it is people's role identity (e.g. that of a citizen, a volunteer, or a professional), and the sensemaking thereof, that determines how people cope with grand challenges and the emotional roller coaster they provoke. Chapter 4 focuses on a micro perspective, by reflecting on my own identity as a researcher, my emotions during the research process, and how I can create value.

Thus, the nexus of identity and value creation spans the entire dissertation, putting the focus in the conceptual Chapter 2 *within an organization*, in the empirical Chapter 3 *across organizations* and in the methodological Chapter 4 *within one person*. Responding to Richard Hamming's (1986) observation at the beginning of this Introduction, empirical data was collected to capture the local view for theory building in a larger context, taking global interdependencies into account. Figure 1.1 depicts this research journey.

Figure 1.1 Conceptual journey of dissertation



1.1.1 Organizational identity and value creation

As a concept, OI has received and is still receiving significant attention from academics and practitioners (Corley, Harquail, Pratt, Glynn, Fiol, & Hatch, 2006; He & Balmer, 2007; Pratt, Schultz, Ashforth, & Ravasi, 2016). Intensive theory building has been taking place in various research communities and disciplines (He & Balmer, 2007; He & Brown, 2013). However, organizations exist to create value, whether economic (in the private sector), societal (in the public sector) or idealistic value (in the non-governmental sector). From a practitioner perspective, OI must contain some sort of value proposition if it is going to be worth the effort. To pin this down, in Chapter 2, my co-authors and I investigate the question of how OI can contribute to value creation in an organization. We explore this by conducting a systematic literature review starting in 1985 (Albert & Whetten) and covering the next three decades, following the three research questions: 1. Does OI create value? 2. What are the different kinds of value that can be created through OI? 3. What are the cause-and-effect relations of OI regarding its surrounding conditions and value creation? Addressing these questions helps to detail the underlying mechanisms of how OI functions and what role it plays – or does not play – in value creation. The answers will be important for practice, helping practitioners in managing organizations and their OI.

First, the systematic literature review takes a closer look at the conceptualization of OI. Following the systematic literature review protocol of Briner, Denyer, and Tranfield (Briner & Denyer, 2012; Denyer & Tranfield, 2009), it points to a fragmented literature that is still without a standardized definition of the OI construct. To impose conceptual order, and to avoid missing important findings, a framework synthesizes the findings of various research traditions. The aim is not to integrate everything into a meta-theory, but to make scientific knowledge understandable and applicable in practice.

As we found that OI is a double-edged sword for value creation, with many of its mechanisms capable of creating but also destroying value, or even acting as an obstacle to further value creation (Dutton & Dukerich, 1991; Livengood & Reger, 2010), it was important to understand the underlying mechanisms. We theorize about possible solutions for this dilemma, including the use of a meta-identity, which could have a unifying effect (Voss, Cable, & Voss, 2006).

1.1.2 Grand societal challenges, research in extreme contexts and a case of forced displacement

While the OI question focuses on what happens within one organization, it takes place in a globalized world in which problems and challenges take on much larger dimensions and where solutions cannot be provided by one organization alone, but require long-term multi-actor engagement (Ansari, Wijen, & Gray, 2013; Eisenhardt, Graebner, & Sonenshein, 2016; Ferraro, Etzion, & Gehman, 2015; George, Howard-Grenville, Joshi, & Tihanyi, 2016; Reinecke & Ansari, 2016). These so-called grand societal challenges have recently been attracting greater attention in the social sciences (Hällgren, Rouleau, & De Rond, 2018). Grand societal challenges affect large portions of a population beyond the boundaries of organizations and communities (Eisenhardt et al., 2016; Ferraro et al., 2015; George et al., 2016). They are “highly significant yet potentially solvable problems” that are “typically complex with unknown solutions and intertwined technical and social elements” (Eisenhardt et al., 2016, p. 1113).

In management and organization studies, scholars have examined grand challenges such as climate change (Ansari et al., 2013; Wright & Nyberg, 2017), poverty alleviation (Banerjee, Banerjee, & Duflo, 2011; Battilana & Dorado, 2010; Dorado, 2013; Mair, Martí, & Ventresca, 2012; Mair, Wolf, & Seelos, 2016), conflicts and wars (De Rond & Lok, 2016), and forced displacement and refugees (Crisp, 2000; De La Chaux, Haugh, & Greenwood, 2018; Kornberger, Leixnering, Meyer, & Höllerer, 2018; Milner & Loescher, 2011).

It is precisely these issues that have come under the spotlight of management and organization studies in recent years (Eisenhardt et al., 2016), leading to an increasing amount of research being conducted in extreme contexts (Hällgren et al., 2018). Hällgren and colleagues (2018) argue that extreme context research provides a “unique platform for the study of hard-to-get-at organizational phenomena [...] [it showcases] the best and worst of human and organizational behaviors and accelerates processes otherwise impeded by bureaucracy, power plays, and politicking” (p. 112).

Therefore, the case study which fuels Chapters 3 and 4 of this dissertation was conducted in the global context of forced displacement and investigates its local

manifestation on the Greek island of Lesbos in 2017 and 2018. This context was useful for revealing the dynamics at play (Yin, 2013) and for developing further theories on grand societal challenges in Chapters 3 and 4.

Lesbos was confronted with the arrival of over 500,000 refugees in 2015, marking the onset of the so-called “European refugee crisis.” In March 2016, the EU–Turkey statement blocked the migration route into Europe via Lesbos. As a result, there was a significant drop in the number of boats (and refugees) arriving on the island. Nevertheless, the refugee situation on Lesbos continued to be a very challenging humanitarian setting, requiring complex responses from international and national actors and citizens on the ground. The hyper-complexity of the multi-level stakeholder setting, with the many different identities of a multitude of stakeholders, is what makes it an important case to study. The stakeholders are the residents of Lesbos, the arriving refugees, the Lesbos municipality, EU actors (e.g. Frontex, European Asylum Support Office, Europol), the Greek state (e.g. Greek Asylum Service, Center for Diseases Control and Prevention), international organizations (like UNHCR or the International Organization of Migration), non-governmental organizations (NGOs) (ranging from international prominent NGOs, to religious, local and grassroots NGOs), as well as independent volunteers, activists, researchers, and media. All actors have their own motivations and different values, goals, and operating procedures.

The way policy frameworks (EU–Turkey statement, Dublin III, European Hotspot Approach) are instantiated results in asylum seekers staying on Lesbos (or other Aegean islands) for the entire period of their asylum procedure. This often takes more than a year, with the result that the number of refugees on Lesbos constantly exceeds the available housing and processing capacity, meaning that the majority of refugees do not have appropriate accommodation and sanitation, psychosocial support, education, or other critical services. Waiting under precarious conditions in a dangerously overcrowded camp that functions in emergency mode causes the inhabitants’ health, foremost their mental health, to deteriorate quickly, frequently resulting in pathological depression (Fotaki, 2019; Médecins sans Frontières, 2017; Pascucci & Patchett, 2018). Various voices have expressed despair about the situation and reported about the trauma it entails, not only for refugees and the local population but also for the people who come to work in the

refugee response. Professional aid workers have compared the situation to their experiences in war zones or missions in the Congo, stating that what they have seen on Lesbos is, in fact, worse (Fontana, 2018; Smith, 2019; Tondo, 2018).

The situation for refugees and people working in the response to arriving refugees on Lesbos qualifies as an extreme context due to a wide array of factors: the suffering of refugees; the impact of their suffering on locals and helpers; the overwhelming complexity of the multi-level stakeholder situation; and the utterly paradoxical nature of the setting. Here, one phenomenon was particularly striking: the conditions in the research context triggered a plethora of emotions in people that had effects on the context itself.

1.1.3 Emotions in institutional contexts

For a long time, emotions have only been discussed implicitly in organizational theory rather than being directly theorized upon. However, emotions are essential to social systems, as they decisively shape perceptions and actions. Thus, they should also be pivotal in organizational theory (Goodwin & Pfaff, 2001; Voronov & Vince, 2012; Zietsma, Toubiana, Voronov, & Roberts, 2019). This has been increasingly acknowledged in recent years, and emotions have sparked a lot of interest in organizational theory (e.g. Creed, Hudson, Okhuysen, & Smith-Crowe, 2014; Lok, Creed, DeJordy, & Voronov, 2017; Toubiana & Zietsma, 2017; Zietsma & Toubiana, 2018). A growing body of literature has been investigating emotions in institutional contexts (Creed et al., 2014; Friedland, 2018; Maitlis, Vogus, & Lawrence, 2013) and most frequently approaches them from a strategic perspective (Zietsma et al., 2019), showing how they are of crucial importance in institutional formation, maintenance, and change processes. Furthermore, emotions have been found to enable diverse stakeholders to work better together (Fan & Zietsma, 2017), while job roles and organizational contexts influence how individuals live, work, and deal with challenging contexts (e.g. De Rond & Lok, 2016). Although the literature on institutional theory, social movement theory, and identity theory already contains a sizable amount of work on emotions, the literature on sensemaking and theory development has produced a rather limited amount of references to emotions (Zietsma et al., 2019). A systematic understanding of the connection between structural emotional triggers, the sensemaking of triggering

events of grand challenges, and mechanisms for coping with them is missing. With a focus on emotions as a resource for sensemaking, Chapter 3 addresses these issues by investigating how the different organizational and professional settings of actors in the so-called refugee crisis affect actors' emotional reactions and coping.

1.1.4 Reflecting on emotions and sensemaking

Emotions are considered a crucial part of the sensemaking process at an individual as well as a collective level (Creed et al., 2014; De Rond & Lok, 2016). They are of vital importance for the construction of personal sense-giving narratives (Creed, DeJordy, & Lok, 2010; Gutierrez, Howard-Grenville, & Scully, 2010), are central to logic construction (Fan & Zietsma, 2017), and ultimately affect behavior (Cornelissen, Mantere, & Vaara, 2014; Maitlis & Christianson, 2014; Rafaeli & Vilnai-Yavetz, 2004).

Yet, if “emotion signals the need for and provides the energy that fuels sensemaking” (Maitlis et al., 2013, p. 222), this applies not only to the observed – it also influences how researchers make sense of their data. Although scholars have already acknowledged that researchers' emotions are important, concluding that compassion plays a role in conducting research (Dutton, Worline, Frost, & Lilius, 2006; Frost, 1999; Whiteman, 2010), researchers' emotions have only been covered in a cursory manner in management and organization studies. Such selective treatment of emotions in the research process carries the danger of skewing the results. The dynamics between researchers' emotions and theory development, in particular, are a major blind spot in scholarly attention. In order to keep improving the quality of sociological studies, a more comprehensive understanding is needed: How exactly do researchers' emotions influence theory development? This question is becoming more important due to the increasing frequency of extreme context research being conducted in management and organization studies (Hällgren et al., 2018), as conducting research in extreme contexts is, of course, very likely to expose researchers to situations that trigger deeply felt emotions. However, the scientific literature falls short in drawing together the macro-level perspective of grand societal challenges in extreme contexts and the micro-level perspective of individuals in these challenging contexts, including researchers' emotions.

Therefore, in Chapter 4, I elaborate on strong emotions in the research context of both grand societal challenges and extreme context research in general. I investigate the role emotions can play in reflexive processes and, ultimately, in theory building in management and organization studies. I provide the specific example of a case study which reveals how an extreme context resulted in deeply felt emotions which I leveraged for theory building and value creation.

1.2 Practical relevance

The findings in this dissertation are relevant for policies and practice. The research direction in Chapter 2 resulted from my employment in a strategic consultancy which used OI as the basis of its work. The research question is: “How does OI create value?” Sorting over 4,000 journal articles, and subsequently carrying out an intensive review of 188 of them, revealed that OI can *create* but also *destroy* value. The resulting locus model can serve to identify where OI resides, create greater awareness of OI, and ultimately provide the basis for more informed strategies and organizational development to enable OI to create value rather than destroy it.

Chapter 3 shows that the instantiation of certain policy frameworks not only affects the people it is aimed at (e.g. refugees) but also has severe effects on numerous other stakeholders. It shows that a paradoxical context that manifests itself on Lesbos as well as at other European external borders contains triggering conditions for strong emotions and that dealing with them is highly demanding. Chapter 3 also provides a deeper insight into the role of emotions in sensemaking and describes pathways on which people with certain role identities typically embark. This insight enables stakeholder organizations to prepare their staff for the individual coping journeys that they are likely to embark on. With this support, organizations can enable their staff to create greater value, both in the context and for themselves. It entails putting things into perspective by providing structural coping support to mitigate the effects that deeply felt emotions have on individuals and, through them, the organizations they are part of. However, it also provides food for thought about what we, as Europeans, allow to happen on our soil.

Chapter 4 expands on the effects of conducting research in extreme contexts and provides practical insights for researchers. It shows how to deal with emotions in

the research process and provides guidelines on how to incorporate them in reflexive practices. Above all, it shows how emotions can be leveraged for value creation in the form of theory development.

1.3 Outline

The dissertation is structured as follows. Chapter 2 presents a systematic literature review of OI and value creation. Chapter 3 moves on to the grand societal challenge of forced displacement, providing an analysis of its local manifestation on the Greek island of Lesbos with a focus on stakeholders' sensemaking and coping behaviors. Chapter 4 deals with emotions in reflexivity and theory building (table 1.1).

While Chapter 2 is a conceptual paper, Chapters 3 and 4 are the result of the empirical work on the case study referred to above. The unit of analysis of Chapter 2 is the macro level, focusing on organizations. In Chapter 3, the unit of analysis shifts from the macro level to the meso level, revolving around groups as defined by their role identity (citizens, volunteers, professionals) across organizations and focusing on their coping paths along role identities. The unit of analysis in Chapter 4 is the micro level, using the researchers' emotions for sensemaking.

Considering Chapters 3 and 4 through Van Maanen's (2011) "tales of the field" categorization, the representational style of Chapter 3 is that of a realist tale, while Chapter 4 is that of a confessional tale which focuses on the researcher's own emotions.

Table 1.1 Overview of three dissertation studies

	<i>Chapter 2</i>	<i>Chapter 3</i>	<i>Chapter 4</i>
<i>Conceptual lens</i>	Organizational identity (OI) theory	Sensemaking theory	Theory building
<i>Study focus</i>	OI and value creation	Sensemaking and coping in extreme contexts	Emotions in reflexive processes and theory building
<i>Research question(s)</i>	Does OI create value? What kinds of value can be created through OI? What are cause-and-effect relations?	How do people make sense of emerging emotions in the local manifestation of a grand societal challenge and how do they cope?	How can researchers modulate the impact emotions triggered in their research for research itself and theory building?
<i>Study design</i>	Conceptual	Empirical	Empirical
<i>Data sources</i>	4,238 articles from 17 peer-reviewed journals scanned, systematic application of exclusion criteria, data-set of 188 articles	63 in-depth interviews, participant observations, and from side lines, field notes, reports, additional data, e.g. social media	Field notes of case study of Lesbos, research notebook, code book, NVivo codes
<i>Methods</i>	Content analysis and critical synthesis	Inductive thematic analysis with abductive elements	Inductive thematic analysis
<i>Style</i>	Systematic literature review	Realist tale	Confessional tale

The abstracts of each chapter are as follows:

Chapter 2 – Abstract. This systematic literature review addresses the questions of whether and how the formation and strength of organizational identity (OI) are associated with value creation. OI is a significant field in management and marketing. The study consists of the systematic content analysis of 188 theoretical and empirical articles across leading management and marketing journals, spanning a period of more than 30 years. To synthesize the various theories and research findings on the concept of OI, we introduce a multi-level and multi-theory framework, covering the micro, meso, and macro levels of analysis, which presents the main forms in which OI manifests itself. Based on mapping prior research through this framework, we then assess whether the research evidence suggests a link to value creation. Current evidence is ambiguous on this, and following our framework suggests the need for greater causal precision in further research and for a stronger theorization of identity dynamics as part of the strategy process.

Chapter 3 – Abstract. An under-researched issue in the study of grand societal challenges is how their local manifestations can trigger deeply felt emotions in individuals and how such emotions impact an individual's sensemaking and subsequent coping strategies. Drawing on an in-depth field study of NGO, governmental and citizen responses to asylum seekers arriving on the Greek island of Lesbos, we draw out the various challenges that stakeholders encounter, the mixed emotions that such circumstances provoke, and the sensemaking processes and coping strategies they use to understand the situation and make it bearable. Informed by these findings, we propose a more general process model that details the sensemaking trajectories that professionals, volunteers, and citizens go through over time as they cope with the suffering and the overwhelming and systemic nature of the grand challenge that they are dealing with on the ground.

Chapter 4 – Abstract. This essay is a methodological reflection on conducting research in extreme contexts, the impact of this on researchers' emotions, and

its subsequent use in theory building. The essay draws on personal experience of conducting research on the Greek island of Lesbos in the aftermath of the European refugee crisis in 2017 and 2018. It contributes to the methodological discourse on emotions by suggesting including them in the context of reflexive practices and theory building, particularly for management research conducted in extreme contexts. Here, the essay adds to the literature on extreme context research, spanning both the macro perspective of global grand challenges and the micro perspective of individuals' emotional burdens. It proffers the metaphor "settled emergency" to describe a multifaceted situation encountered in the field that can also be found in many organizational contexts in which an unbearable situation is perpetuated by informal dynamics.

Chapter 5 – Abstract. In this chapter, I revise the main findings and conclusions of the three previous chapters and discuss limitations as well as directions for future research.

1.4 Declaration of contribution

Chapter 1: This chapter was written independently by the author of this dissertation.

Chapter 2: The majority of the work in this chapter was carried out independently by the author of this dissertation. The author of this dissertation is the first author of this paper. She conducted the theoretical framing and formulated the research question. Furthermore, she performed the literature review and conducted the analysis, interpreted the findings, created the framework/model and wrote the manuscript. The co-authors, Prof.dr. J. P. Cornelissen and Prof.dr. G. Jacobs contributed by providing significant guidance in terms of selection of journals, systematic review and feedback in terms of structuring and writing the paper.

Chapter 3: The majority of the work in this chapter was carried out independently by the author of this dissertation. The author of this dissertation is the first author of this paper. She conducted the majority of interviews in the field, developed the theoretical framing, formulated the research question, conducted the empirical data collection in terms of participant observation and observations from the sidelines, and collected the secondary material (e.g. reports, photos, and videos). Furthermore, the author of this dissertation conducted the data analysis, constructed the framework/model, and wrote the manuscript. The second author, M. van der Giessen, and third author, Prof.dr. G. Jacobs, also conducted interviews in the field. The third and fourth author, Prof.dr. J. P. Cornelissen, contributed by giving significant feedback in terms of structuring, improving aspects of the framework/model, and the writing of the paper.

Chapter 4: This chapter was written independently by the author of this dissertation. The author received valuable feedback regarding structuring and writing from her supervisor Prof.dr. Joep Cornelissen and co-supervisor Prof.dr. Gabriele Jacobs. A version of this essay will be published in the book: Jacobs G., Suojanen I., Horton K., & Bayerl P. S. (Eds.) *International Security Management – New Solutions to Complexity*. Springer, Cham, Forthcoming 2020.

Chapter 5: This chapter was written independently by the author of this dissertation.

1.5 Declaration of funding

The research in this dissertation received no specific grant from any funding agency in the public, commercial, or not-for-profit sectors.

Chapter 2

Organizational identity and value creation: A systematic review and critical synthesis¹

This systematic literature review addresses the question of whether and how the formation and strength of organizational identity (OI) is associated with value creation. OI is a significant field in management and marketing. The study consists of the systematic content analysis of 188 theoretical and empirical articles across leading management and marketing journals, spanning a period of more than 30 years. To synthesize the various theories and research findings on the concept of OI, we introduce a multi-level and multi-theory framework, covering the micro, meso, and macro levels of analysis, which presents the main forms in which OI manifests itself. Based on mapping prior research through this framework, we

¹Parts of this chapter appear in the following peer-reviewed conference proceedings:
Langenbusch, C., Cornelissen, J. P., & Jacobs, G. (2017). Organizational identity and value creation: A systematic review and critical interpretive synthesis. 33rd *EGOS Colloquium*. The Good Organization: Aspirations, Interventions, Struggles. Sub-theme 49: Identity Tensions and Strategizing. Copenhagen Business School, Denmark (July 6-8, 2017).

Langenbusch, C., Cornelissen, J. P., & Jacobs, G. (2017). Organizational identity and value creation: A systematic review and critical interpretive synthesis. *RSM Research Day*. Erasmus University, Rotterdam School of Management, The Netherlands (May 9, 2017).

then assess whether the research evidence suggests a link to value creation. Current evidence is ambiguous on this, and following our framework suggests the need for greater causal precision in further research and for a stronger theorization of identity dynamics as part of the strategy process.

2.1 Introduction

Over the last three decades, the field of OI has received significant and still increasing attention from both academics and practitioners (Corley et al., 2006; He & Balmer, 2007), as “the concept of identity is key to understanding modern organizations” (Gioia, Schultz, & Corley, 2000, p. 78). Yet, organizations exist to create value, whether economic (in the private sector), societal (in the public sector), or idealistic (in the non-governmental sector). So, if the concept of identity is key for the understanding of organizations, how does it contribute to the value creation of an organization? In this systematic literature review, we explore this question by reviewing research on OI to date and by assessing the link between OI and value creation.

Academically, addressing this question helps detail the underlying mechanisms of how OI functions and creates value, or not, while for practitioners this question is important as a way of managing organizations.

Generally speaking, value creation in organizations depends on the labor of organizational members (Bowman & Ambrosini, 2000); as such, channeling the productive efforts of members through OI may lead to strategic outcomes (Oliver, 2015) and therefore constitutes a crucial component of an organization’s value creation.

Value for organizations can be understood as financial success or equivalent output parameters, but it can also be understood more broadly around long-term reputation, status, and esteem beyond direct monetary results or their equivalents (Porter & Kramer, 2012). Value can, for example, reside in greater identification between individual and organization, defined as “perception of oneness with, or belongingness to some human aggregate” (Ashforth & Mael, 1989, p. 23). In some cases, value creation can be quite far reaching: for instance, where employees experience their work as meaningful, realize the important contribution their

organization makes to the world, and see what they are adding to the organization to make that contribution possible.

The amount of literature on OI, as well as on value creation as a subject, is extensive. Nevertheless, the literature on value creation through OI specifically is very limited. While the activation of value creation through the development and fostering of OI is a topic that is gaining attention in practice, there is no dedicated academic study on the topic. Therefore, the aim of the present study is to scientifically inquire whether and how OI can activate value creation, and results in the following three research questions:

1. Does OI create value?
2. What are the different kinds of value that can be created through OI?
3. What are the cause-and-effect relations of OI regarding its surrounding conditions and value creation?

Through a systematic literature review of the key concepts involved in these questions, we follow an evidence-based management approach (Rousseau, 2012) to identify the current research evidence on OI and its potential for value creation, using the reviewing protocol developed by Briner, Denyer, and Tranfield (Briner & Denyer, 2012; Denyer & Tranfield, 2009; Tranfield, Denyer, & Smart, 2003).

We outline the systematic process of collecting, identifying, and analyzing the relevant OI literature regarding “definition of identity,” “locus of identity,” “type of value creation,” and “cause-and-effect relations for value creation,” and we introduce a multi-level, multi-theory framework to synthesize past research and examine the links between OI and value creation. The framework we propose categorizes the various definitions of OI, based on whether it primarily resides in a narrative, cognition, group-membership, discourse, behavior, or institution. We summarize the potential value along these dimensions, identify the underlying cause-and-effect mechanism or relationships involved and conceptualize a set of possible mechanisms.

We discover that the relation between OI and value creation is a double-edged sword: many mechanisms surrounding the OI construct actually destroy value or act as a block to further value creation (Dutton & Dukerich, 1991; Livengood & Reger, 2010). This insight reiterates the desire of many OI scholars to address the relevance of the study of OI and its mode of functioning because – when treated

inadequately – OI can destroy value, or even the entire organization (Fiol, Pratt, & O'Connor, 2009).

To understand the underlying mechanism, it is important to decode the cause-and-effect relations regarding how and in what ways OI creates or hampers value. On the one hand, for OI to be able to activate value creation it needs to be strong (central, distinctive, and enduring) (Melewar & Karaosmanoglu, 2006; Simoes, Dibb, & Fisk, 2005), yet on the other hand, a strong identity is the biggest hindrance to much needed change (Brown, 2001; Fiol, 2002). In this paper, we theorize about possible solutions for this dilemma including the use of a meta-identity, which has a unifying effect (Voss et al., 2006) and still leaves space for organizational members to adapt and evolve. To cultivate a meta-identity, we propose the idea of an OI interface where OI is jointly defined and managed by all stakeholders. We further recommend the use of OI for the strategizing process, especially in the context of change and multiple identities. Finally, we recommend that organizations give their members permission to evolve instead of ordering them to change, and argue for a new guild of consultants that are trained in this complex functioning of OI and can steer organizations in the direction of greater value creation for all stakeholders.

2.2 Organizational identity and value creation

Within the social sciences, OI is often referred to as being central to the study of human and organizational behavior (Albert & Whetten, 1985). Three decades after its first appearance in management studies in 1985, the concept of OI is at a stage of aged adolescence (Corley et al., 2006), and intensive theory building across various research communities and disciplines, and on several levels of analysis (individual, group, organization as collective, organization as an entity), has taken place (He & Balmer, 2007). “Because of the various theoretical perspectives available to study identity, the field of work identity studies has developed in a somewhat haphazard fashion. As a result, there is an increasingly vast, heterogeneous, and fragmented body of literature” (Miscenko & Day, 2016, p. 2) without a standardized definition of this construct. Thus, scholars have yet to agree on a coherent definition of the concept of OI and on how identity works to the

advantage (or disadvantage) of organizations (Fiol, 2001; Hsu & Hannan, 2005). Some studies reveal positive impacts of OI (Foreman & Whetten, 2002; Livengood & Reger, 2010), while others investigate negative impacts (Colman & Lunnan, 2011).

There have been reviews investigating identities and identity work in organizations (Brown, 2015, 2017; Miscenko & Day, 2016), OI formation and change (Gioia, Patvardhan, Hamilton, & Corley, 2013), multiple and intra-personal identities (Ramarajan, 2014), and value creation in very specific contexts such as post-merger integration (Colman & Lunnan, 2011), as well as reviews on identity work that develop a framework for comparing social value (Kroeger & Weber, 2014). Nevertheless, no previous work has focused generally on value creation through OI or has taken the various types of value creation into account. This lack of integration might be inherent to OI research: OI research forms a fragmented field not only regarding content and methods but also regarding its research community (Briner & Denyer, 2012). However, “there is a continuing need for informed conversations across field and paradigmatic boundaries” (Brown, 2015, p. 23). Therefore, this systematic literature review develops a framework that covers the multiple levels, methods, and research traditions discussed to date in the literature, and paves the way for future work across theoretical boundaries.

2.3 Review method

This systematic literature review follows the steps developed by Briner, Denyer and Tranfield on conducting systematic reviews in business and management (Briner & Denyer, 2012; Denyer & Tranfield, 2009; Tranfield et al., 2003). For this review, we use both management and marketing journals over a period of more than 30 years, starting at the beginning of the OI discipline with the ground-breaking work of Albert and Whetten (1985).

Following the practice of *International Journal of Management Review* articles (Finnegan, Runyan, Gonzalez-Padron, & Hyun, 2016; Kim & Aguilera, 2016) and in agreement with Knights and Clarke (2017), who call the production of an ultimate identity literature review a “misplaced aspiration” (p. 339) given the extensive body of literature, we limit the scope of this analysis. The selection of journals was

conducted after consulting experienced scholars in the organizational, marketing, and management field regarding which journals have a history of publishing OI research.

The selection includes journals with a SSCI (Social Sciences Citation Index) impact factor of 1.0 or higher: ten management journals (*Academy of Management Journal (AMJ)*, *Academy of Management Review (AMR)*, *Administrative Science Quarterly (ASQ)*, *British Journal of Management (BJM)*, *Journal of Management Studies (JMS)*, *Journal of Management (JOM)*, *Journal of Organizational Behavior Management (JOBM)*, *Organization Studies (OS)*, *Organization Science (OSci)*, and *Strategic Management Journal (SMJ)*) and seven marketing journals (*European Journal in Marketing (EJM)*, *Journal of the Academy of Marketing Science (JAMS)*, *Journal of Consumer Research (JCR)*, *Journal of Marketing (JM)*, *Journal of Marketing Management (JMM)*, *Journal of Marketing Research (JMR)*, and *Journal of Marketing Science (JMS)*).

2.3.1 Sample and data collection

We limited this review to peer-reviewed articles due to their quality status and their high impact on academic discourse. We conducted the first article search in May 2016 using the Institute for Scientific Information's (ISI) Web of Science database for the preselected journals and took into account articles published between 1985 and July 2017. The reason for choosing the ISI's Web of Science database was its focus on academic journals, its high selection standards, and its position within the academic community. Secondly, we limited the initial list of publications offered by this database to the general categories of "Management" and "Business and Economics." We followed the procedure developed by Denyer and Tranfield (2009) using four databases: Emerald, ProQuest, EBSCOhost, and JSTOR.

The main scope condition for the systematic literature review search was that articles had to cover the "OI" construct. To demarcate this construct from other constructs that are closely associated with the OI construct, we referred to Balmer and Greyser (2003) who differentiate six key constructs: organizational and corporate identity, image, branding, communication and reputation. When understanding OI as "central, distinctive, and enduring" to an organization as a whole (Albert & Whetten, 1985), the identity construct is more specific to an

organization and its members than corporate image, branding, communication, or reputation. The latter set of constructs are directed outwards, take place in the environment of an organization, and their appearance is occasionally subject to rapid changes. The “OI” and “corporate identity” constructs, as described by Balmer and Greyser (2003), can be seen as the “source,” and the corporate image, branding, communication, and reputation as the manifestation of this source.

Although the “corporate identity” concept is used in marketing and OI is the dominant concept in organizational behavior, both disciplinary strands of thought relate to identity and have a certain “degree of synergy and integration” (He & Balmer, 2007, p. 765) with complementary functions. “OI” refers to the mutual central values of the organizational members, while “corporate identity” refers more to the “communication of those values through symbolism, communication and behavior” (Cornelissen, 2014, p. 67). Furthermore, the concept of corporate identity has been expanded during its development so that there is now greater overlap with the concept of OI (Cornelissen, Haslam, & Balmer, 2007), with scholars in marketing even using these two concepts as synonyms (Balmer & Gray, 2003; Bromley, 2001; Topalian, 2003). Consequently, the constructs of “OI” and “corporate identity” are both included in this review (Brown, Dacin, Pratt, & Whetten, 2006; Cornelissen et al., 2007).

The main search string that we employed was “OI.” In addition, we ran searches with alternative keywords, such as “corporate identity.” The keyword search was run as part of the title, abstract, and keywords of the articles and returned a total of 4,238 articles for the journals and time window mentioned. To further refine the search results, some articles were excluded, namely those which: 1. do not cover organizations as a unit of analysis; 2. do not cover the construct of OI; 3. do not use the alternate keywords as synonyms for OI; 4. only cover individual identity with no relation to OI (like narcissistic CEOs or leader personality); 5. only cover very specific forms of organizations, e.g. OI of nations; 6. only cover team identity or small collective identities (such as dyads or small teams); or 7. only mention OI marginally, meaning when articles mentioned OI only once or twice or only in subordinate sentences.

Figure 2.1 visualizes the process to give a better understanding of the systematic design of this review. In the filtering process, every abstract of the 4,238 articles

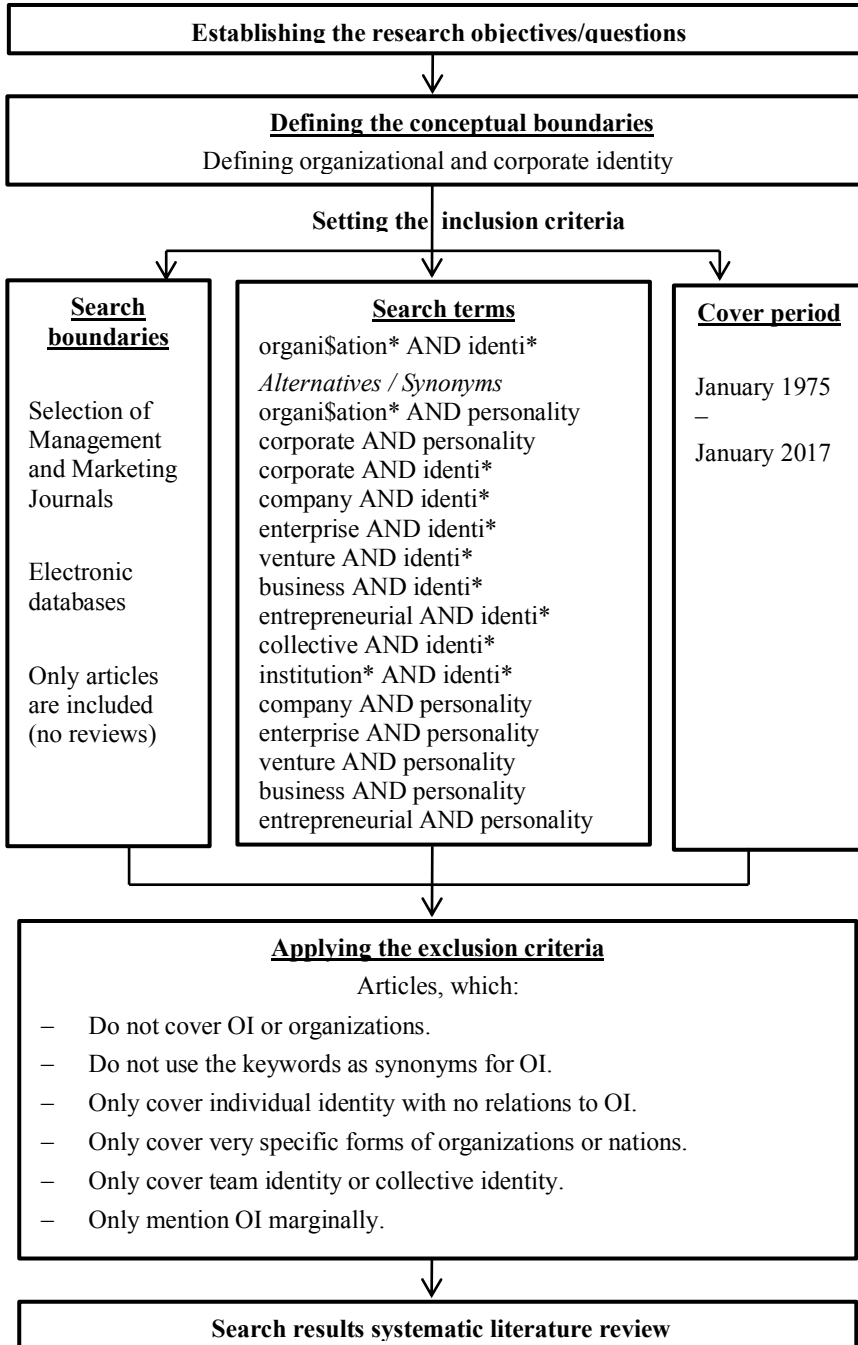
was read and evaluated against the inclusion and exclusion criteria, and was documented with a screenshot. After this process, a total of 188 relevant articles from 11 journals remained (table 2.1, figure 2.1, appendix 2.I), constituting the data-set for the content analysis and synthesis of this systematic literature review.

To analyze the article-set and gather the evidence regarding the research questions, a data extraction sheet incorporating 24 categories was created. The categories were built in an iterative process of reading the articles and then creating categories. After this process the key categories that remained for this study were: “definition of identity,” “locus of identity,” “type of value creation,” and “cause-and-effect relations for value creation.” These categories are crucial as they are the basis for the construction of the framework that constitutes the answers to our research questions.

Table 2.1 Overview of included journals and number of articles

Abbreviation	Full title	Number of articles
AMJ	Academy of Management Journal	20
AMR	Academy of Management Reviews	20
ASQ	Administrative Science Quarterly	15
BJM	British Journal of Management	17
EJM	European Journal of Marketing	31
JAMS	Journal of the Academy of Marketing Science	10
JM	Journal of Marketing	1
JOM	Journal of Management	1
JOMS	Journal of Management Studies	17
JOOS	Organization Science	34
OS	Organization Studies	22

Figure 2.1 Summary of the systematic literature review process
(based on Nolan & Garavan, 2016)



2.3.2 Defining organizational identity through locus

Since the introduction of the OI construct by Albert and Whetten (1985), intensive theory building has taken place across various research communities and disciplines in organizational theory and beyond. However, there is no consensus on a standardized definition of this construct. Most scholars depart from the seminal definition of Albert and Whetten (1985) who define OI as characteristics which are perceived and believed to be central, distinctive, and enduring, and oftentimes couple this definition with further aspects. Others go back to the definition of individual identity by Mead (1934) and/or Cooley (1902), who comprehend identity as a set of beliefs, signifying “who one is” through interactions with others and thus anchoring OI in personal identity (Hatch & Yanow, 2008). However, the psychological tradition at this micro level differs from the sociological constructs at the meso and macro levels. It becomes especially vague when the identity of individuals and its relation to the OI is covered but not demarcated explicitly (e.g. Brown, 1997).

Cornelissen (2002) questions the OI metaphor and its warranted value as a heuristic in general, while Haslam, Postmes, and Ellemers (2003) see OI as the enabler which makes the functioning of an organization possible in the first place, claiming that without OI there would be no “effective organizational communication, no heedful interrelating, no meaningful planning, no leadership” (Haslam et al., 2003, p. 365). This demonstrates that the OI construct is employed by various research communities which do not use it synonymously or have various interpretations. The potential unwarrantedness of the OI metaphor due to the limited degree of comparability “between the individual-level construct of identity and the collective-level construct of organization” (Cornelissen, 2002, p. 266) might be the very source of the imbroglio of definitions which followed after the first introduction of the OI construct. As we are still working today in a situation in which there is no reliable understanding of how OI works, we would like to contribute a starting point by gathering what is already known and what is not known, consolidating the scientific findings of the various scientific communities.

In the data-set of this review, an article by Cornelissen (2006b) introduced the image-schematic view of the OI metaphor which disentangles the different perspectives and understandings of “organization” and “identity” by distinguishing

six different research traditions. Our own inductive coding was congruent with the labels offered by Cornelissen (2006b), so that we base our categorization on the same six research traditions to cluster and harness the myriad of OI definitions. Furthermore, we introduce the category locus, which identifies where OI manifests itself, to make this knowledge actionable for practice.

Locus can be the place, locality, or situation where OI is rooted. Accordingly, OI may reside in the narrative locus (orchestrated storytelling), the cognitive locus (perception of the organization's members), the group-membership locus (shared group cognition), the discourse locus (collective discourse), the behavior locus (behavior of organizational members), and the institutional locus (functioning of the organization as one entity).

These six differing loci of possible OI are at distinct human aggregate levels. The narrative and institutional loci reside at a macro level, as OI in this position is universal for the entire organization. The group-membership and the discourse loci are at a meso level, as they manifest through a collective which is not necessarily the entire organization but rather manifests itself in certain groups within and outside of the organization. The cognitive and behavior loci of OI reside in individuals and thus at a micro level. Having six loci of OI manifestation at various levels of analysis makes the framework multi-level.

2.4 Value creation through organizational identity

OI is characterized by value-multiplicity (Fumasoli, Pinheiro, & Stensaker, 2015). Having established the locus categorization for managing the many definitions of OI, we use it for the categorization of value creation as well. As behavior, cognition, and language are interconnected processes (Vygotskiĭ, Hanfmann, & Vakar, 2012), so is the existence of OI and the value it creates. Consequently, we exert the locus categorization also to cluster the various manifestations of value creation with its underlying causal models. Nevertheless, this does not mean that the locus of the acknowledged OI and the value it facilitates are necessarily the same. To illustrate this point, if OI is considered to have its locus in the perceptions and beliefs about an organization, the value it facilitates can manifest itself through the behavior of its members.

Using the locus categorization not only for OI but also for value creation has the advantage that categories work intuitively as they have been already established. To present the framework (table 2.2), we first conceptualize each locus, followed by an explanation of the conception of value creation in each locus. Subsequently, we juxtapose the findings of the various data-set studies regarding value creation and cluster it towards each locus.

Table 2.2 Locus-schematic view of OI and its value creation

Research tradition	Locus	Level of analysis	Conception of value creation	Types of value creation
Organizational communication	Narrative	Organization (macro)	Content and result of organizational narrative	Branding, Visual identity, Access to financial resources, Effective leadership
Cognitive framing	Cognitive	Individual (micro)	Perceptions, emotions & attitudes of organizational stakeholders	Identification of organizational members, Reduction of ambiguity, Commitment & loyalty, Sensemaking & issue-interpretation, Belief, Motivation, Awareness & learning
Social identity	Group-membership	Collective (meso)	In-group collective cognition and behavior	Belongingness, Customer identification, Tool for differentiation
Discursive psychology	Discourse	Collective (meso)	Content and result of collective conversation	Effective collaboration, Social knowledge
Organizational behavior	Behavior	Individual (micro)	Behavior of organizational members	Organization supporting behavior, Guide for action, Guide for <i>how</i> things are done <i>here</i>
Institutional theory	Institutional	Organization (macro)	Functioning of organization as an entity	Issue interpretation & decision making, Providing & guiding strategic moves, Managing change, Instrument of power & control, Financial success, Defining organizational form & culture, Solution for identity conflicts, Products and material facts, Social value

The framework provides the answer to the research questions: 1. “Does OI create value?” and 2. “What are the different kinds of value that can be created through OI?” In each locus, we will elaborate the different types of value creation and present causal relations whenever they are found, thus answering research question 3. “What are the cause-and-effect relations of OI with its surrounding conditions and value creation?” This is important as these can be levers to activate the value creation of OI. In table 2.2 we display condensed answers to research questions 1. and 2. A subset of studies established cause-and-effect relations, and appendix II offers a condensed overview of these relations and thus an overview of our findings for question 3.

2.4.1 Narrative locus

Through the lens of the “organizational communication” research tradition, OI is established through language (i.e. speech, rhetoric), and is understood in this tradition as the “imposition of an actor (‘corporate rhetor’) in, and through language” (Cornelissen, 2006b, p. 695). Having a narrative locus means that OI manifests in the orchestrated, and even dictated, narrative of one storyteller, e.g. the organization’s founder, the top management, or the marketing department, and that it is transported through organizational communication. The content of the OI narrative may also be influenced by competing companies’ storytelling (Karthikeyan, Jonsson, & Wezel, 2016). Therefore, the “result is a fabric that is in a constant state of becoming, unravelling in some areas, embroidered over in others” (Brown, 2006, p. 735). The conception of value in the narrative locus manifests in the content and results of the organizational narrative, and thus in the organization’s storytelling/branding and its effects, such as access to capital markets or effective leadership. So, OI with a narrative locus may create value that resides in other loci.

From a marketing point of view, there is consensus that value resides in and is created through *storytelling/branding* for internal and external audiences. OI in the narrative locus provides guidelines for corporate *visual identity management* and corporate brand development (Balmer, 2012; Balmer & Gray, 2003; Cayla & Penaloza, 2012; Hatch & Schultz, 1997; Venable, Rose, Bush, & Gilbert, 2005). It can also be the source of and driver for an organization’s corporate image (Thøger Christensen & Askegaard, 2001; Urde, 2003; Van Riel & van den Ban, 2001) and

reputation management (Abratt & Kleyn, 2012). OI in the narrative locus provides the platform for audiences to make inferences about the OI's uniqueness and thus creates customer demand (Alvesson, 1994) as well as inferences about the firm's internal processes (Verhaal, Khessina, & Dobrev, 2015). Externally, the OI narrative helps audiences to decide whether to connect to the organization strategically (Zachary, McKenny, Short, Davis, & Wu, 2011), while internally it can be the means to socialize and integrate newcomers to a company (Martin, 2016). Furthermore, OI is used to reflect internal power positions (Chreim, 2005), e.g. enacting the leadership role (Golden-Biddle & Rao, 1997) or justifying the authority conferred on top management (Rodrigues & Child, 2008). Some scholars consider OI as an *effective leadership* tool (Haslam et al., 2003) for mobilizing and directing organizational members (Dutton & Dukerich, 1991; Cayla & Penaloza, 2012), using it as a template to "quickly and coherently [...] communicate with stakeholders" (Santos & Eisenhardt, 2005, p. 501).

OI creates important value by serving as a tool to attract investors, supporting the mere existence and viability of the organization (Brown, 1997; King, Clemens, & Fry, 2011; Melewar & Karaosmanoglu, 2006; Navis & Glynn, 2011). With an appealing narrative, OI can enhance a firm's general *access to capital markets* (Brown, 1997; Venable et al., 2005). Navis and Glynn (2011) even consider OI as being central to how entrepreneurs secure the resources they require for new ventures, forming a *touchstone for investors' judgment* regarding a new venture's plausibility; thus, they claim: "the entrepreneurial identity serves as a site where entrepreneurs claim and investors judge" (2011, p. 493). The uniqueness of OI can constitute organizations' legitimacy (Abratt & Kleyn, 2012) and is the core source for competitive advantage, such as being more appealing to a qualified workforce or indicating higher product quality in comparison to similar companies (Brown, 1997; Zachary et al., 2011).

2.4.2 Cognitive locus

From the cognitive framing research tradition, OI is rooted in the cognition and deep-seated assumptions of organizational members about what or who the organization is (Cornelissen, 2006b). While the narrative locus houses the desired OI, the cognitive locus holds the perceived identity (Cheng, Hines, & Grime, 2008;

Hatch & Schultz, 1997). Here the conception of value also resides in the perceptions, emotions, and attitudes of organizational stakeholders. By being “a source of pride and therefore positive emotion” (Fiol et al., 2009, p. 46) the concept of identity carries inherent value as it conveys emotional resonance (Bundy, Shropshire, & Buchholtz, 2013). “Who we are” is of vital importance for organizations to be able to act accordingly towards others, as well as for others to be able to interact with the organization (Albert & Whetten, 1985; Brickson, 2007). Therefore, value creation of OI in the cognitive locus can also be considered as being key to value creation, which will then manifest in actions.

The greatest consensus within the scientific community regarding the value of OI is the value that resides in *identification of organizational members* (Alvesson & Willmott, 2002; Berger, Cunningham, & Drumwright, 2006; Brickson, 2013; Fiol & Romanelli, 2012; Holmer-Nadesan, 1996; Kärreman & Alvesson, 2001; Kilduff, Funk, & Mehra, 1997; Maguire & Phillips, 2008; Miller, Le Breton-Miller, & Lester, 2011; Millward, Haslam, & Postmes, 2007; Moufahim, Reedy, & Humphreys, 2015; Schultz & Hernes, 2013; Zachary et al., 2011). Here, identification is understood as “the perception of oneness” (Ashforth & Mael, 1989, p. 3) with the organization in which the OI provides the essential characteristics to identify with (Kärreman & Alvesson, 2001).

This notion of identification is connected to appreciation and pride – the feelings of members of an organization about the organization – rather than to material exchange (Lievens, van Hove, & Anseel, 2007). Thus, the manifestation of identification is cognitive and consequently located in the cognitive locus. Identification with a group leads individuals to unite emotionally with fellow group members and results in team-oriented attitudes (Tanghe, Wisse, & van der Flier, 2010). Millward and Postmes (2010) observed “mounting evidence demonstrating the performance potential of social identification (with teams and organizations) through heightened commitment, decreased turnover intentions, willingness to go the extra mile” (p. 327). Nevertheless, causality was only revealed by Holmer-Nadesan (1996), who found empirically that “identification occurs when individuals accept the identities provided in the dominant discourse; that is, they define self [sic] and their relations with others in the terms of the dominant discourse” (p. 58). This shows that OI can be considered as having one locus (discourse), while

producing value (identification) in another (cognitive locus).

In the context of change, identity is able to *lower ambiguity* and provides a sense of purpose and direction for organizations' members (Leavitt & Sluss, 2015; Santos & Eisenhardt, 2005), acting as an equilibrator between combined logics (Battilana & Dorado, 2010) in the complex setting of an organization. In this context, Leavitt and Sluss (2015) invoke Napoleon Bonaparte's quote "History is a set of lies agreed upon," arguing that OI narratives in the form of myths and legends are identity-based lies with the cognitive value to lower stress during insecure and challenging phases.

It is critical for members' identification that organizations act in an identity-consistent way (Dutton & Dukerich, 1991), while, in the context of conflicting sub-identities, it might be difficult for an organization to act coherently in an identity-consistent way. Based on their comparative case study of two Bolivian microfinance organizations, Battilana and Dorado (2010) found that "to be sustainable, new types of hybrid organizations need to create a common OI that strikes a balance between the logics they combine" (p. 1419).

There is consensus that positive attitudes towards the organization are particularly created if the OI is strong, i.e. consistent and attractive (Dutton & Dukerich, 1991; Simoes et al., 2005). OI creates involvement of its members in the form of *commitment* (Ashforth, Rogers, & Corley, 2011; Golden-Biddle & Rao, 1997; Pratt & Foreman, 2000a; Santos & Eisenhardt, 2005) and *loyalty* (Pratt & Foreman, 2000a) "due to the fact that their own values, feelings, and personalities have made (and continue to make) a contribution to the identity of their company" (Brønn, Engell, & Martinsen, 2006, p. 897).

Apart from influencing the perception of an organization's members, OI serves them as a compass for *sensemaking* of "who we are," and thus determining the *meaning and importance of issues* they are confronted with (Dutton & Dukerich, 1991; Gioia & Thomas, 1996; Glynn, 2000; Santos & Eisenhardt, 2005). The sensemaking process enables organizational members to view the world through the lens of the organization's identity, thereby facilitating effective action (Harquail & King, 2010; Mattarelli & Tagliaventi, 2015). OI becomes engraved in the *beliefs* of both internal and external audiences and eventually affects behavior (Tripsas, 2009). The set of beliefs held about the OI act as a strong cognitive model for

members through which they interpret change initiatives and can even foster constructive change processes (Elsbach & Kramer, 1996).

Additionally, OI strengthens the overall work *motivation* and ultimately performance (Melewar & Karaosmanoglu, 2006; van Dick, Grojean, Christ, & Wieseke, 2006). At an individual level, OI is a motive for self-esteem and self-continuity (Brickson, 2013). At the organizational level, it motivates employees to work cooperatively (Hardy, Lawrence, & Grant, 2005; Kogut & Zander, 1996), especially when mutual identity is confirmed (Milton & Westphal, 2005). OI fosters *awareness* (Livengood & Reger, 2010), the search for new ideas (Mattarelli & Tagliaventi, 2015), and sets the direction of *learning* (Kogut & Zander, 1996).

2.4.3 Group-membership locus

The group-membership locus of OI derives from the “social identity” research strand, in which OI resides in the perceptions and cognitions of the group formed by its individual members regarding what is shared, such as the accumulation of behavioral practices, symbols, artefacts, and other material products of the in-group (Cayla & Penaloza, 2012; Cornelissen, 2006b). This “embodies both cognitive categorization processes which take place in the minds of individuals, and collective products of those processes and the activities they encourage” (Cornelissen, 2006b, p. 699), resulting in a shared group cognition that manifests in group membership, group behavior, and a perceived oneness of that particular group (Ashforth & Mael, 1989). OI offers the definition of the group and its membership (Kogut & Zander, 1996), differentiating the “in-group” from relevant “out-groups” (Ashforth et al., 2011). The conception of value in this locus is the in-group’s collective cognition and behavior.

OI creates here a sense of *belongingness* for organizational members (Santos & Eisenhardt, 2005) which, at the same time, can be part of articulating their individual personality (Cayla & Penaloza, 2012; Dutton & Dukerich, 1991). However, it can also be a schema for the organization itself, e.g. in terms of which industry a company belongs to (Clegg, Rhodes, & Kornberger, 2007). In her multi-method study, Bartel (2001) found that, through intergroup comparison, esteem for in-group members strengthens the organizational identification even further.

In addition, *customer identification* can be triggered through OI, making customers think they are dependent on a company as its offerings in terms of products, services, or culture are so exclusive and distinct that they cannot be obtained elsewhere (Scott & Lane, 2000a). This can be far reaching as organizational affiliation may be seen as the only way for individuals to express an important part of their personality (Scott & Lane, 2000a). Apart from defining “Who are we?” identity also provides answers to the question “How are we different from others?” (Kreiner, Hollensbe, Sheep, Smith, & Kataria, 2015, p. 983), as it expresses the uniqueness of the organization and serves as a *tool for differentiation* from other groups (Bundy et al., 2013; King et al., 2011; Kogut & Zander, 1996; Zachary et al., 2011), also in regards to products and services (Melewar & Karaosmanoglu, 2006). Here OI is the source of competitive strength by distinguishing the organization from potential competitors (Ashforth et al., 2011; Santos & Eisenhardt, 2005), which is particularly important when the organization has to prevail in a competitive environment (Venable et al., 2005; Zachary et al., 2011).

2.4.4 Discursive locus

Approaching OI from a discursive psychology tradition, the construct is seen as a product of the collective discourse about it. So, OI is in a constant process of becoming. The interactivity in the discursive locus demarcates it clearly from the narrative identity locus, in which a particular interest group directs the narrative from a position of power. In the discourse locus, identity is constituted through and within the discourse of all participating stakeholders. “In a discursive sense identity is continuously (re)structured and therefore processual, situational, fractured, contested, dynamic, precarious and fluid” (Cornelissen, 2006b, p. 698). Value in this locus is conceptualized as the content and result of the collective conversation.

The effective and fruitful organizational dialogue containing exchange of information and co-creation of solutions supports coordination within the organization and is an important motivation for *effective collaboration* (Hardy et al., 2005; Kogut & Zander, 1996). The discursive value of OI is elementary, as it is the basis for all collaborative forms of organizational action and conscious interrelation of various stakeholders (Cornelissen et al., 2007; Haslam et al., 2003). In his ethnographic study of a Dutch national newspaper, Ybema (2010) found that,

through reflective identity talks, organizations' members construct self-sensemaking while developing OI. Moreover, Hardy and colleagues (2005) found that the discursive production of identity is a critical element in producing effective collaboration and ultimately the bonding of the organizations' members with the organization itself. This identity dialogue leads to *social knowledge* (Kogut & Zander, 1996), which transfers “social, cultural, ethical, and spiritual values” (Motion & Leitch, 2009, p. 1057).

2.4.5 Behavioral locus

The organizational behavior research tradition houses OI within the unique characteristics and features of the organization. These features form “an interpretation of organizations as unique, coherent, and stable sets of activities, values, and people” (Cornelissen, 2006b, p. 697). In this research tradition, the locus of OI resides within the behavior of the organization's members, and what organizational members refer to as “this is *how* we do things *here*.” Thus, in this context, OI provides the substrate for behavior supporting the organization (Ashforth et al., 2011). The conception of value in the behavior locus, then, considers value to manifest in the behavior of organizational members.

Various studies have discovered that employees who are highly identified with the organization are disposed to go the extra mile for their organization in the form of *organization supporting behavior* (Bundy et al., 2013; Ullrich, Wieseke, Christ, Schulze, & van Dick, 2007; Van Dick et al., 2006), promoting the well-being of the group (Brickson, 2000). According to Lok (2010), behavior differs depending on the degree of identification. Scholars have found that the greater the appeal of the perceived OI, the stronger a person's identification with the organization (Dutton, Dukerich, & Harquail, 1994) and the higher their interpersonal cooperative behavior (Dukerich, Golden, & Shortell, 2002). So, in their study of the Finnish Stock Market, Aspara and Tikkanen (2011) found empirical evidence for the positive influence of company identification on individuals' willingness to invest in companies' shares. When identification with the organization becomes pathologic, as in the case of narcissistic CEOs (Galvin, Lange, & Ashforth, 2015), this can also be a source of value creation for the organization, as these personalities put all their

effort into outperforming the competition (Galvin et al., 2015). However, this can also result in value destruction (see 2.5).

Another great value of OI is its functioning as a *guide for action* (Bundy et al., 2013; Dutton & Dukerich, 1991; Gioia, Price, Hamilton, & Thomas, 2010; Gioia & Thomas, 1996; Liston-Heyes & Liu, 2013; Santos & Eisenhardt, 2005), leading behavior in coherent directions (Tripsas, 2009) and serving newcomer socialization by fostering compatible action (Martin, 2016). The value of OI manifests not only in the form of a road map for *what* to do, but also for *how* things are done (Santos & Eisenhardt, 2005), leading to behavior at the individual level which is considered to be “typical” of that organization (Dutton & Dukerich, 1991). In one of the few studies that were conducted on the competitive economy, Simoes and Mason (2012) found in their longitudinal case study of a buyer–supplier relationship that OI creates consistency in behavior and therewith successful relationship outcomes (Simoes & Mason, 2012).

2.4.6 Institutional locus

Through the institutional theory lens, OI resides in the role of the organization as a unitary “social actor” who acts through communication and “culturally patterned practice (e.g. organizational dress, ideological script, rites and rituals, artifacts)” (Cornelissen, 2006b, p. 699) to differentiate and legitimize itself in its environment. The conception of value in the institutional locus refers to the value related to the functioning of the organization as one entity, tackling many of the organization’s strategic issues.

Several scholars therefore consider OI to contribute value by being a guide for *issue interpretation* for the organization’s members (Bundy et al., 2013; Dutton & Dukerich, 1991; Foreman & Whetten, 2002; Gioia et al., 2010; Gioia & Thomas, 1996; Voss et al., 2006), as it constitutes a point of reference for assessing the importance of issues, such as threats to the organization and/or the OI (Brickson, 2007; Dukerich et al., 2002).

Many acknowledge that OI holds value for the future development of an organization as it can constitute an effective *strategic tool* (Melewar & Karaosmanoglu, 2006; Nutt, 2004) which guides *strategy formulation and strategic decision making* (Baker & Balmer, 1997; Dutton & Dukerich, 1991; Gioia et al.,

2010; He, 2012; Liston-Heyes & Liu, 2013; Lok, 2010; Zachary et al., 2011) and is crucial for strategic moves (Kodeih & Greenwood, 2014; Leitch & Davenport, 2011). Furthermore, many scholars agree that OI constitutes a precious source of competitive advantage (Brown & Humphreys, 2002; He & Balmer, 2013; Melewar & Karaosmanoglu, 2006; Perretti, Negro, & Lomi, 2008), whether as substrate for an advantageous image and the reputation of an organization (He & Balmer, 2013), as an enabler to respond in an authentic way to competitors' actions (Livengood & Reger, 2010), or as a "filter" for a company's technical choices (Tripsas, 2009).

Several scholars (e.g. He, 2012; Pratt & Foreman, 2000a) consider multiple sub-identities to facilitate more *future strategic value* compared to organizations with a single identity, as several identities provide an organization with sufficient vital diversity to handle complex organizational environments involving the demands of various stakeholder groups.

Moreover, Gioia and colleagues (2000) recognize OI as a *guide for organizational change*. As a first step, it can be a tool for evaluating whether change is needed by comparing how the organization sees itself with how others view it. Where these two perceptions do not correspond, Gioia and colleagues (2000) consider this to be an indicator that change was needed. Through his study in the education sector, Martins (2005) found that the top managers of US business schools who found their school's ranking to be different to their own view of their school's standing, were more likely to take on organizational change. So, if handled properly, corporate identity can enable organizations' strategic change, innovation, and learning (He & Balmer, 2013). According to He and Baruch (2010), OI also has an essential value for organizations to respond to external changes, challenges, and threats. As Gioia and colleagues (2000) put it: "Identity fluidity is learning aptitude to master change" (p. 456).

Some scholars (Alvesson & Willmott, 2002; Driver, 2009) comprehend the value of OI as constituting an *instrument of power and control*. When it follows the principle of "form follows content," it is the basis for *defining organizational form and culture* (Hsu & Hannan, 2005). In the context of mergers and acquisitions, the organizational identities "of premerger firms are used to serve as the foundation for the emergence of the identity of the merged firm" (Drori, Wrzesniewski, & Ellis, 2013, p. 1735), thus safeguarding core competencies for the developing new

identity (Nutt, 2004). OI's form-giving value manifests itself through structuring and harnessing the collective energies inside an organization (Haslam et al., 2003). When viewed from the outside, OI can be a tool for facilitating alignment with the marketplace (Melewar & Karaosmanoglu, 2006) and, when it is sharp and specialized, for market partitioning (Sikavica & Pozner, 2013). According to Brønn and colleagues (2006), it can redefine a company's position in its business sector. Even in the early days of OI research, Dutton and Dukerich (1991) saw value in OI in its ability to convert an organization's challenges to opportunities.

Fiol and colleagues (2009) even consider OI to be the *solution to identity conflict*. Nevertheless, neither Dutton and Dukerich (1991) nor Fiol and colleagues (2009) can provide strong and definite causal relations. Although Fiol and colleagues (2009) offered a first step towards causality with their Intractable Identity Conflict Resolution Model, no causal relation that always behaved in the same way was found.

Many scholars even acknowledge that OI can generate clear economic advantages (Kärreman & Rylander, 2008; Millward & Postmes, 2010; Swaminathan, 2001; Tripsas, 2009), with consensus that a strong single identity leads to higher sales figures and greater *financial success* (Phillips & Kim, 2009; Swaminathan, 2001; Voss et al., 2006), e.g. in the form of greater donations to NGOs (Venable et al., 2005). Liu and Wezel (2015) see OI as a tool for greater market success. While various scholars relate this to the identification of customers with the organizations' identity (Millward & Postmes, 2010; Schultz & Hernes, 2013), others consider OI to be the foundation for *products and material facts* (Cornelissen, 2002; Haslam et al., 2003). This may well result in internal and external creation of *social value* (Brickson, 2007; Leitch & Davenport, 2011). Nevertheless, OI's most crucial value remains its support for the mere survival of the organization itself (Perretti et al., 2008; Swaminathan, 2001; Topalian, 2003; Zachary et al., 2011).

2.5 Value destruction

Although the departure point for this study was value creation through OI, the analysis revealed that OI could also be the cause of value destruction. We found value destruction through OI in various loci.

In the cognitive locus, the most frequently mentioned value destruction is a *dis-identification* or ambivalent identification (Anand, Joshi, & O’Leary-Kelly, 2013; Dutton & Dukerich, 1991; Humphreys & Brown, 2002). As Dutton and Dukerich (1991) found through their study of New York’s Port Authority, identity is of pivotal importance to organizations’ members. If they encounter a stark mismatch between their own identity and the OI, organizational members’ “sense of who they are and what they stand for” (Dutton & Dukerich, 1991, p. 550) is under attack. If a clear sense of what to do, based on OI, is jeopardized, motivation and identification can be destroyed (Livengood & Reger, 2010).

Within the behavior locus, Galvin and colleagues (2015) found the negative impact of over-identified individuals who act in a self-serving manner, while at the same time believing that their behavior does serve the true interest of the organization. To describe this dysfunction, they introduced the term “narcissistic organizational identification.” Further constraints to value creation are battling sub-identities or unclear OI itself, as both block organizational members’ actions (Tripsas, 2009).

Within the institutional locus there is general consensus that OI can also be the very thing that *prevents organizational change* (Brown & Starkey, 2000; Martins, 2005; Motion & Leitch, 2009; Nag, Corley, & Gioia, 2007; Reger, Gustafson, Demarie, & Mullane, 1994) due to ego-defense behavior (Brown & Starkey, 2000; Reger et al., 1994). Tripsas (2009) found it particularly difficult in the case of the introduction of identity-challenging technology.

Several scholars agree that, as well as creating new knowledge, OI can *prevent organizational learning* (Brown & Starkey, 2000; He & Balmer, 2013; Huzzard & Östergren, 2002; Nag et al., 2007) and undermine the broader strategic endeavor of organizations’ development (Nag et al., 2007). “It is because learning is situated in an identity that it is also difficult to unlearn” (Kogut & Zander, 1996, p. 510). Ciborra (1996) concluded: “The most frustrating implication of this identity building process is that a new identity must be trashed when one would like to keep

it, i.e. after a painful learning process when one has become not only a pioneer, but a leader” (p. 108). Both imply that the process of unlearning and new learning is at the heart of hindering change.

Apart from the fact that conflicts can be the impetus for development, *identity conflicts* are resource intensive and might ultimately threaten an organization’s survival (Fiol et al., 2009). Identity conflicts are often the result of hybrid OI (Golden-Biddle & Rao, 1997) and can block flexibility and creativity in an organization (Fiol et al., 2009) and result in conflicts in strategy (Glynn, 2000). Voss and colleagues (2006) found through a study of 113 non-profit professional theaters that the divergent opinions of top management on the OI resulted in lower ticket revenues and lower net income. Furthermore, organizational performance was lowest when disagreement about the OI was highest (Voss et al., 2006), which also points to the importance of having a single strong identity.

Some researchers have found that a strong OI can also severely *hamper strategic moves* and block managers from seeing unfamiliar possibilities (Fiol, 2002). Kogut and Zander (1996) concluded that “Identity creates more than just powerful motivations for cooperation; it also imposes the weighty costs of ruling out alternative ways to organize, and to exploit new avenues of development” (Kogut & Zander, 1996, p. 515). Livengood and Reger (2010) discovered OI’s potential value destruction in the competitive domain of organizations. Here, value destruction can manifest in the form of either overreactions inside of this “cognitive competitive space” or by not considering options that are outside this competitive domain. In addition, Leitch and Davenport (2011) point out that OI can constrain tactical and strategic opportunities in corporate marketing, while Tripsas (2009) indicates that identity-challenging technological opportunities can be missed.

Taking the former into account, there is also consensus that OI can cause negative financial performance in the form of opportunity costs, hampering the organization from tapping into its maximal performance capacity. Therefore, value creation through and around OI is not the automatic output of just having an identity, as OI can also be the very reason for value destruction.

2.6 Discussion and future research avenues

In this paper, we offer a systematic literature review of OI and synthesize the possible linkages between OI and value creation. Specifically, we take a meta-narrative approach to examine the various OI research traditions (Gough, 2013; Wong, Greenhalgh, Westhorp, Buckingham, & Pawson, 2013a) in combination with a synthesis aimed at identifying specific sets of OI-related mechanisms which will lead to valued outcomes when operating in a particular context (Wong, Greenhalgh, Westhorp, Buckingham, & Pawson, 2013b).

2.6.1 Fragmentation of OI research

A first observation that arises from our review is that OI research has been very much siloed and structured along different lines. We found that 98 of the 188 articles analyzed consider OI to have a cognitive locus, 49 a narrative locus, 32 a discursive locus, 27 an institutional locus, 22 a group-membership locus, and 21 a behavioral locus. Of the 188 articles, only 59 considered that OI can have two or more loci at the same time. Some combinations of OI loci, however, can be found more frequently than others. The cognitive space locus of OI is acknowledged by many, while they primarily consider OI to manifest in another locus (e.g. Chun & Davies, 2006; Cooren, Kuhn, Cornelissen, & Clark, 2011; Driver, 2009; Glynn & Abzug, 2002; Howard-Grenville, Metzger, & Meyer, 2013; Maguire & Phillips, 2008). Furthermore, the combination of the narrative and discourse loci is the most common and is found in 19 articles. The cognitive space locus is the most commonly acknowledged in the vast majority of the journals. Only articles in the JOMS and the OS most often have a narrative and/or discursive locus. We found qualitative methods were used three times as often as quantitative methods, and extensive theory building was predominant, although only one journal (AMR) has an exclusive theoretical focus in its mission, and others even have a clear orientation towards practical applicability (JMS, JM, and JAMS).

Based on our framework, our proposed loci are at different organizational aggregate levels (table 2.2). When we investigated the development of research over time, we found a change in levels addressed in OI research. At the beginning, OI was only analyzed at one level, e.g. the individual or the organizational level. As the complexity and interaction of levels were acknowledged more over time, the OI

field became more interested in multi-level identity analysis (Ashforth et al., 2011; Pratt & Foreman, 2000a), and recent research (Koppman, Mattarelli, & Gupta, 2016) focuses on cross-level identity dynamics covering the links between identity construction and identity regulations at the individual or organizational level. Ashforth and colleagues (2011) argue in this context that “a collective identity, intra-subjective understanding (‘I think’) fosters intersubjective understanding (‘we think’) through interaction, which in turn fosters generic understanding – a sense of the collective which transcends individuals (‘it is’)” (Ashforth et al., 2011, p. 1144) and claim that “individual identity shapes collective identity just as surely as collective identity shapes individual identity” (Ashforth et al., 2011, p. 1152). This argument supports the premise of our framework, which is that the organization (macro), group (meso), and individual (micro) levels are reciprocally linked.

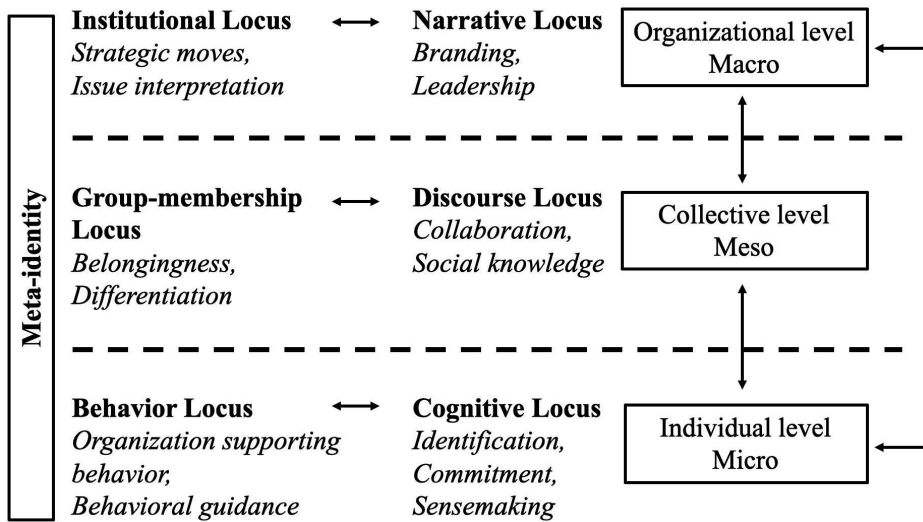
We furthermore believe that this reciprocal linkage can also be considered as a separation of power of the commonly shared and created OI. As in many other areas, the separation of power is of vital importance – in the OI context regarding the definition and construction of the OI. Figure 2.2 shows the OI interface we propose with its various parts that define, create, and house the OI. We believe all parts have their fair share and that it is important that all members of an organization, no matter what their aggregate level, have a common awareness and understanding of the OI and their personal stake in it.

Nevertheless, synthesized prior research can be seen as inadequate, as the extant literature does not sufficiently incorporate different perspectives on the OI phenomenon and its linkages to value creation. This development has to be considered critically as this procedure automatically stresses some aspects of OI while also ruling others out. On the contrary, we believe that when pursuing a holistic understanding of the phenomenon it is vital to take all research strands into account. This should not be based on a desire for harmony, as Corlett, McInnes, Coupland, and Sheep (2017) rightly argue, but as a response to the quest to take the field forward (Haslam, Cornelissen, & Werner, 2017), with the conviction that every perspective on identity has its entitlement.

Following an evidence-based management approach, to make sound decisions in a complex environment, all loci of OI have to be brought together (Rousseau, 2012). Therefore, we propose the idea of an OI interface (figure 2.2) where all the

different perspectives of OI are mapped. This interface should not be considered as an object but rather as an ever-present construct. The main imperative of this interface is to create awareness of the various loci housing OI, e.g. making it conscious in stakeholders' mind so that they can act in full awareness of it when jointly defining, managing, and using it. Hopefully, it will also be of value for future research, functioning as a mind map for scholars to incorporate the various loci of OI when conceptualizing future studies. The identity domain should not limit itself to one method for epistemology alone. We therefore reinforce the appeal (Horton, Bayerl, & Jacobs, 2014) that future research in this field, should be multi-case, multi-source, and multi-research, taking qualitative and quantitative data into account.

Figure 2.2 Meta-identity as an OI interface



2.6.2 Validity of value found and cause-and-effect relationships

The types of value creation that we identified in the preceding sections differ in their validity and according to whether they have been supported by empirical research. This applies especially to the still quite scarce empirical research on cause-and-effect relationships (see appendix II). Nevertheless, only sound knowledge of cause-

and-effect relationships can facilitate the active navigation of the OI's functioning towards value creation.

The most frequent causal relation found is that, for OI to be able to cause direct reputational or economic value, it needs to be strong (Melewar & Karaosmanoglu, 2006; Simoes et al., 2005; Voss et al., 2006). Here, more research is desirable as there is evidence that strong identities also bear the highest risk of destroying or, at least, impeding value. The cause-and-effect relationships are the steering wheels to work with in order to influence OI outputs positively and prevent value destruction.

2.6.3 Ambiguity of OI value creation – enabler of and hindrance to change

One of our main findings is that OI is ambiguous towards value creation; it can create value as easily as it can destroy it, e.g. by hindering an organization from changing and thus enduring. These mechanisms have the character of opportunity costs.

The functioning of OI, whether in full view or hidden, will lead organizations to take strategic decisions which are not exclusively determined by productivity and revenue. There is consensus that a strong OI is needed to leverage its potential value but that a particularly strong OI can act as a limitation (Brown, 2001). Reger and colleagues (1994) elaborated, even in 1994, on OI duality: "If beliefs about OI are ignored, identity can act as a barrier to the implementation of planned organizational change that threatens it. However, if these implicit and taken-for-granted assumptions are surfaced and affiliated with change efforts, OI can be a powerful source of leverage" (Reger et al., 1994, p. 578). As He and Balmer (2013) later put it, corporate identity "can facilitate and enable strategic change, innovation, and learning (it may also act as a constraining force)" (2013, p. 424). Reger and colleagues (1994) argue that employees' views on OI may "create cognitive opposition to radical change" (Reger et al., 1994, p. 565) in the form of ego-defence mechanisms such as denial, rationalization, or idealization. Indeed, there is vast evidence that radical change is a risky strategy (Ford, Ford, & D'Amelio, 2008; Jacobs, Christe-Zeyse, Keegan, & Polos, 2008; Jacobs, van Witteloostuijn, & Christe-Zeyse, 2013).

Organizational change processes need to take all parties of the OI interface into account (figure 2.2) in order to create sustainable value. Ybema (2010) showed that

members' discussion about the identity of their organizations' members can facilitate an identity change when they "reflectively put together a story about their changing" (2010, p. 499) identity. However, this implies the active and reflective confrontation of and with organizational members. Based on the findings of their extensive ethnographic fieldwork of an Indian ad agency, Cayla and Penalzoza (2012) recommend that identity change in the form of foreign market adaption should be conducted by: first, making OI more explicitly obvious; second, mapping areas of incompatibility between OI; and third, reassessing and reinterpreting expansion to future strategic options. Nevertheless, Cayla and Penalzoza (2012) found it difficult to adjust a company's business model as "certain strategic elements (e.g. products, prices, even research practices)" (p. 39) are equated, to a great extent, with managers' understanding of their OI. This is also an indicator for the use of a meta-identity through which OI can distance itself from product, prices, and services and lift it on a meta level and thus be able to adapt to new situations in a way that still appears authentic to the organization.

2.6.4 Identity tension due to multiple identities in the strategizing process

There is consensus that multiple identities exist in organizations (He, 2012; Pratt & Foreman, 2000b). We believe that it is important to understand the interaction of these sub-identities to be able to manage and regulate them as part of the organization's steering and strategizing processes, and to keep in mind at the same time the various levels of analysis to be able to provide solutions at the organizational (macro), group (meso), and individual (micro) levels.

It is possible that the introduction and active management of a meta-identity, in combination with various measures at the macro, meso, and micro levels, could be an approach to regulate struggling sub-identities in organizations. We argue that this role could be filled by a meta-identity. At the organizational aggregate level, the corporate rhetor can unite the various sub-identities through adequate storytelling within the organization. In addition, the functioning of the organization as one entity can have signaling effects on the various sub-identities. This in turn may influence the micro level with the individuals' thoughts and actions. The group level is the greatest challenge for managing sub-identities, as this is the substrate on which sub-identities sprout and grow, and which have the power to influence individuals'

thoughts and actions. From this perspective, the macro, meso, and micro levels have a complex relationship.

The key to unifying sub-identities may reside in the ability of a meta-identity that acts not solely at the organizational level but also infiltrates the group and individual levels as a strategy-as-practice reaching the hearts, thoughts, and eventually the actions of the individuals in the organization. This can be facilitated by finding the uniting factors and not imposing a meta-identity that would trigger notions of resistance. Emphasizing the uniting factors makes a uniting meta-identity visible without extinguishing the various sub-identities. As Harris (2011) showed in his study, top management of international non-governmental development organizations resolved multiple conflicting identities by creating a convincing and common meta-identity.

While so-called hybrid organizational identities (Golden-Biddle & Rao, 1997) can result in identity conflicts, they can also be the very reason for having multiple options in future strategies as these sub-identities are already part of the organization (Pratt & Foreman, 2000a). Future research could therefore usefully explore the role of such meta-identities in enabling the resilience of organizations and their ability to change while staying true to their past in an enduring and authentic manner. We find interesting research questions would be: Can a uniting meta-identity be the solution to sub-identity conflicts? How should it be constructed and managed? How can it generate the greatest value?

2.7 Limitations and implications

OI is a comprehensively studied research area in the broader domain of organizational studies. The added value of this systematic literature review is that it emanates from both the organizational and marketing literatures, bringing together fields that are fragmented through an integrative approach across research traditions and levels of analysis. A natural limitation of this study is that it is constrained to 17 journals and, further, that the presented link to value creation is not always the direct result or finding of a replicable study. Nevertheless, this study's findings are grounded in a systematic and replicable procedure which provides high quality output due to their peer-reviewed nature. The proposed framework is multi-level,

multi-method, multi-field, and multi-theory, incorporating the following theories: social identity theory, OI theory, personal identity theory, multiple identity theory, collective identity theory, identity theory, identification theory, image theory, organizational theory, social theory, corporate identity theory, institutional theory, stakeholder theory, sensemaking theory, psychodynamic theory, self-discrepancy theory, and narcissism.

The framework makes the myriad of definitions and understandings of OI manageable by distinguishing it by the locus where OI manifests. Furthermore, the framework provides a structure for bringing together and understanding findings from various research traditions to make manageable everything that is already known on value creation through OI. Combining these lenses, we have striven to present a more holistic picture of the OI phenomenon and provide an overview of its value creation.

Cross-disciplinary findings are especially important for the corporate world as ignoring means for value creation, only because findings originate in another theoretical domain, is a luxury no company can permit itself in practice. As well as contributing to the organizational and management literature on value creation through OI, this study may also fruitfully inform the strategy literature.

Apart from enhancing awareness of this subject, we also hope that this review will trigger more work on OI and value creation specifically. Although operating in the context of value ambiguity, illustrated cause-and-effect relations are levers for adjustments that managers can use to actually create value in organizations. However, we have demonstrated that value creation and value destruction in the context of OI are two sides of the same coin.

We agree with the conclusions drawn by Scott and Lane (2000b) that “the rise of the ‘external strategic consultant’ is, to some degree, a by-product of the struggle by organizations to come to terms with themselves” (p. 144). There is a need for the development of wise, self-reflecting, and psychologically skilled consultants who perform a similar role for organizations to the one psychologists perform for individuals. An external view is needed in the form of a new guild of consultants who navigate and manage OI within companies. Their work should not be limited to applying knowledge; they should also wisely involve themselves in the organization and work jointly with it to develop the organization further. Rather

than being “just another” analytical and managerial tool, OI and organizational identification should be of particular interest to those who are seeking to structure and harness the collective energies of organizations. For organizational consultants, this will surely demand a high tolerance of ambiguity and mature personalities.

2.8 Conclusion

Considering the scientific work conducted since the first appearance of the OI construct, critical voices would argue that very little is actually known today about value creation through OI. Nevertheless, acting in the tradition of pragmatic determinism (Dul & Hak, 2007), OI can be treated as a managerial theory-in-use, acting on the best knowledge we have at this given moment.

The starting point for this review was to carve out the value creation that OI facilitates. However, what we discovered was the exact opposite. Many mechanisms surrounding the OI construct actually destroy value or act as a block to further value creation if we let it work without reflection. If OI is such a determining factor for organizations, it is important as a first step to have awareness of it and its mode of action, otherwise we cannot use it and can only watch things happen which we either do not question or do not understand.

There are obvious risks to taken-for-granted elements of the organization and the society around it in terms of values and norms, e.g. in terms of diversity and inclusion. Making this explicit can indeed be a driver for positive social change (Stephan, Patterson, Kelly, & Mair, 2016). Therefore, we need to develop a consciousness towards OI at the different levels of analysis: in organizations, in groups, and very importantly in individuals. For this challenge, envisioning the OI interface can be of support. Having awareness of OI’s determining factors, functioning, and output, allows us to influence and use OI to the advantage of organizations and their members. Here, the individual in an organization radiates in a tension field of being an identity agent of the OI, on the one hand, and being directed by it, on the other. If OI determines and affects, to such an extent, how the organization functions, it is important to consider it before every seminal decision, for example, as part of the cultural due diligence process in the context of mergers or acquisitions. Here OI could be used to avoid certain failure by making sure that

two organizational identities do not mutually exclude and thus cannibalize each other. This is especially important as OI can act as a hindrance to change. This seems like a task that will require squaring a circle, particularly for the future guild of organizational consultants who will use identity as the anchor for their work. Maybe the solution is that it is not about change and consulting, but about developing – out of the identity – a natural evolution with consciousness of who we are and where we come from and, to invoke Gustav Mahler, not worshipping the ashes but keeping the fire burning.

Chapter 3

Coping with ambivalent emotions: Making sense of the local manifestation of forced displacement¹

An under-researched issue in the study of grand societal challenges is how their local manifestations can trigger deeply felt emotions in individuals and how such emotions impact an individual's sensemaking and subsequent coping strategies. Drawing on an in-depth field study of NGO, governmental and citizen responses to asylum seekers arriving on the Greek island of Lesbos, we draw out the various challenges that stakeholders encounter, the mixed emotions that such circumstances provoke, and the sensemaking processes and coping strategies they use to understand the situation and make it bearable. Informed by these findings, we propose a more general process model that details

¹Parts of this chapter appear in the following peer-reviewed conference proceedings: Langenbusch, C., Cornelissen, J. P., Jacobs, G., & van der Giessen, M. (2019). Coping with ambivalent emotions: Making sense of the local manifestation of forced displacement. *35th EGOS Colloquium*. Enlightening the Future: The Challenge for Organizations. Sub-theme 9: Paradoxes of Enlightenment: Enlightenment of Paradoxes. Edinburgh, United Kingdom (July 4-6, 2019).

Langenbusch, C., Cornelissen, J. P., Jacobs, G., & van der Giessen, M. (2019). Coping with ambivalent emotions: Making sense of the local manifestation of forced displacement. *6th Annual Writing Workshop*. University of Edinburgh Business School, United Kingdom (March 4, 2019).

Langenbusch, C., Cornelissen, J. P., Jacobs, G., & van der Giessen, M. (2018). European refugee response crisis and its manifestation on Lesbos: Coping with an institutionalized mess. *VU Business & Society Workshop*. University of Amsterdam Business School, The Netherlands (November 19, 2018).

the sensemaking trajectories that professionals, volunteers, and citizens go through over time as they cope with the suffering and the overwhelming and systemic nature of the grand challenge that they are dealing with on the ground.

3.1 Introduction

The Greek island of Lesbos was confronted with over 500,000 refugees in 2015, marking the onset of the so-called “European refugee crisis.” During the first months of the crisis, a complex amalgamation of local, national, European and global organizations arrived on the island and started to organize relief efforts for refugees in an ad hoc manner.

A year later, in March 2016, the EU–Turkey agreement acted as a game changer by blocking the migration route into Europe via Lesbos. As a result, the number of boats arriving with refugees dropped significantly from the first day that the agreement came into effect. Nevertheless, the refugee situation on Lesbos continued to be a challenging humanitarian setting, requiring complex responses from international and national governmental actors, the local municipality, non-governmental organizations (NGOs) and citizens on the ground. The complexity of the multiple stakeholder groups that are part of the situation inspired us to study this setting, which involves local residents of Lesbos, arriving refugees, the Lesbos municipality, EU actors (e.g. Frontex, European Asylum Support Office, Europol), the Greek state (e.g. Greek Asylum Service, Center for Diseases Control and Prevention), international organizations (United Nations High Commission for Refugees (UNHCR) and the International Organization for Migration), NGOs (ranging from prominent international NGOs to local and grassroots NGOs), as well as independent volunteers, activists, researchers and the media, who all have their own motivations and ways of approaching the refugee crisis.

The refugee crisis can be classified as a “grand societal challenge.” Grand societal challenges affect large sections of a population beyond the boundaries of specific organizations and communities (Eisenhardt, Graebner, & Sonenshein, 2016; Ferraro, Etzion, & Gehman, 2015; George, Howard-Grenville, Joshi, & Tihanyi, 2016). Such challenges are “highly significant yet potentially solvable

problems” that are “typically complex with unknown solutions and intertwined technical and social elements” (Eisenhardt et al., 2016, p. 1113).

In management and organization studies, scholars have studied grand challenges such as climate change (Ansari, Wijen, & Grey, 2013; Wright & Nyberg, 2017), poverty alleviation (Banerjee, Banerjee, & Duflo, 2011; Battilana & Dorado, 2010; Dorado, 2013; Mair, Martí, & Ventresca, 2012; Mair, Wolf, & Seelos, 2016), conflicts and wars (De Rond & Lok, 2016), and forced displacement and refugees (Crisp, 2000; De la Chaux, Haugh, & Greenwood, 2018; Kornberger, Leixnering, Meyer, & Höllerer, 2018; Milner & Loescher, 2011).

To date, most of this work has been at the macro level, identifying organized responses to grand challenges (Ferraro et al., 2015), including how organizations can cooperate or align their efforts to address these challenges at the societal or political level (Ansari et al., 2013). Far less research has been conducted at the micro level, detailing the ways in which grand challenges “bear down” on individuals and organizations in specific local settings and call on their resourcefulness to make sense of such challenging circumstances (De Rond & Lok, 2016). From this perspective, grand challenges require the involvement and cooperation of a large set of stakeholders on the ground. In this paper, we therefore investigate through an in-depth case study how the grand challenge of forced displacement and responding to the refugee crisis is made sense of locally and dealt with by different stakeholder groups in the specific locale of the island of Lesbos. Drawing on our empirical data, we theoretically elaborate how different role identities (i.e., being a local, volunteer or professional) influence the emotional response, sensemaking and coping strategies of the individuals involved.

Our study contributes to the literature in three ways. First, we provide an in-depth account of local individual responses to the grand challenge of forced displacement. In doing so, we aim to offer an account of grand challenges on a “human scale,” detailing how people themselves make sense of grand challenges when they are present in their day-to-day surroundings. Second, we build theory on how self-ascribed roles (“role identities”) and emotions influence the ways in which individuals make sense of the grand challenge and how the combination of these triggers specific coping strategies. Third, as part of our theory building, we identify the mediating influence of “ambivalent emotions,” which, once constructed by

individuals as part of their sensemaking, helps them cope with the refugee crisis in a way that is simultaneously involved and dispassionate. We discuss this emergent finding and draw out its implications for work on sensemaking and grand challenges. Overall, our main contribution is the development of a cyclical process model of how individuals with different backgrounds (citizen, volunteer, professional) make sense of and cope with a grand challenge on the ground.

3.2 Theoretical background

Grand societal challenges (Eisenhardt et al., 2016; Ferraro et al., 2015; George et al., 2016; Reinecke & Ansari, 2016) are typically characterized by significant imbalances of power (Berrone, Gelabert, Massa-Saluzzo, & Rousseau, 2016) and cannot be solved by a single actor or nation, requiring long-term multi-actor engagement (Ansari et al., 2013; Eisenhardt et al., 2016; Ferraro et al., 2015). As mentioned earlier, few studies have investigated the micro-level challenges faced by individual stakeholders with differing identities (De Rond & Lok, 2016; Hällgren, Rouleau, & De Rond, 2018). From a micro-level perspective, individuals working on grand challenges are often intensely emotionally involved. Such heightened emotions may derive from the dramatic nature of the situation and the human suffering involved (Cornelissen, Mantere, & Vaara, 2014; De Rond & Lok, 2016), or from the strong involvement of the individual volunteer, professional or citizen in the role they play and the contribution they make (Duffy & Dik, 2013; Schabram & Maitlis, 2017). Such strong involvement, which may be considered as a “calling,” can in effect mediate psychological distress in challenging situations (De Rond & Lok, 2016; Schabram & Maitlis, 2017).

Individuals who are confronted with grand societal challenges at a local level experience breaking points in their sensemaking through surprise and emotions of displacement, disruption and discomfort, which trigger individual sensemaking processes (Holt & Cornelissen, 2014; Maitlis & Christianson, 2014). Such individuals are then faced with the micro-level challenge of making sense in their own way of the situation they face (De Rond & Lok, 2016; Hällgren et al., 2018). Here, emotions are considered a crucial part of the sensemaking process about grand challenges at the individual and collective levels (Creed, Hudson, Okhuysen, &

Smith-Crowe, 2014; De Rond & Lok, 2016) and ultimately affect behavior (Cornelissen et al., 2014; Maitlis & Christianson, 2014).

However, there is little research that draws together the macro level of grand societal challenges with the micro perspective on individuals' sensemaking and coping behaviors in extreme and, for individuals, seemingly paradoxical contexts. The scope of our study lies in the sensemaking of grand challenges at a local level and investigates how the different organizational and professional settings of actors in the refugee crisis affect actors' emotional reactions and coping. More specifically, we include within our scope residents of Lesbos, volunteers and aid workers in NGOs, as well as employees in governmental organizations (GOs) and transnational security organizations (TSOs). In doing so, we explore the micro manifestations of a macro challenge and study in detail the individual and collective sensemaking responses of various actors to the challenges on the ground. Based on our field data, we document the typical emotions of these responders and theoretically elaborate the emotion-triggered pathways through which they make sense of the situation on the ground and find a way to cope, or not. By highlighting these emotion-based sensemaking patterns, we contribute to the literatures on sensemaking and coping, as well as to the emerging stream of work on grand challenges in the field of organization studies.

3.3 Methodology

3.3.1 The research setting: The European refugee response crisis and its local manifestations on Lesbos

In 2015, the Greek holiday island of Lesbos was confronted with the arrival of refugees six times the number of local residents. Lesbos became the focus of the EU's attempts to halt the influx of migrants into the EU. This resulted in a large media presence and extensive media coverage, which damaged the image of the island as a holiday destination for years to come and which coincided with a national financial crisis already in full swing. About three months after the onset of the crisis, local authorities started to take control of the situation, supported by international governmental organizations including European agencies such as the European

Border and Coast Guard Agency (Frontex), the European Asylum Support Office and UNHCR. A year later, the number of refugees arriving decreased drastically overnight after the EU–Turkey agreement came into effect on March 18th, 2016. At the same time, prevailing policy frameworks, namely the EU–Turkey statement, the Dublin III regulation and the European Hotspot Approach, were preventing the through-flow of asylum seekers from the Greek islands to the mainland or the rest of Europe. These policy frameworks dictated that asylum seekers had to stay on Lesbos for the entire period of their asylum procedure, which could easily take more than a year. Various voices have been expressing their despair about the situation and reporting about the emotional trauma this entails not only for refugees and the local population but also for people who come to work as part of the refugee response.

Refugee numbers continue to exceed the available housing and processing capacity of Lesbos, and the majority of refugees do not have appropriate accommodation and sanitation, leading to inadequate provision of psychosocial support, education and other critical support services. “In the Moria hotspot on the Greek island of Lesbos this limbo often takes the form of protracted encampment in hyper-precarious conditions” (Pascucci & Patchett, 2018, p. 326), exacerbating the trauma of many refugees, especially children (Médecins Sans Frontières [MSF], 2018; Tondo, 2018). This has caused distress in aid workers as a typical reaction to them experiencing their work as pointless (De Rond & Lok, 2016) and the deteriorating mental health of large numbers of camp inhabitants (MSF, 2017; Smith 2017).

The context is further characterized by extensive bureaucratic and legal constraints on people’s ability to make a substantial difference. However, for people who come to work in the refugee context on Lesbos, the many ambiguities and paradoxes are hard to understand, creating fertile ground for intense and often ambivalent emotions. We took the macro-level conditions and challenges as a given and as a context that people have to deal with at an individual level. We thus explore the following research question: How do people make sense of a grand societal challenge on the ground, what emotions do they form and how do they cope?

3.3.2 Data sources

As an island, Lesbos has a natural geographical boundary (Yin, 2013). Our qualitative fieldwork took place mainly in and around Mytilene, the capital of Lesbos, and its refugee sites including the two camps where the majority of actors operate and the tourist hotspot of Molyvos, whose economy has been significantly affected. The first, second and third authors, hereafter referred to as the “field team,” visited Lesbos in autumn 2017 and spring 2018. Before entering the field, the team conducted a document review to explore the institutional context. Our data collection consisted of in-depth interviews and participative and non-participative observations.

3.3.2.1 Interviews

The main part of our data-set consisted of 63 interviews, of which 58 were recorded and transcribed verbatim, resulting in 983 single-spaced pages of data. Interviews were conducted with a wide range of stakeholders, including TSOs, GOs and NGOs, as well as the local population, hereafter referred to as “citizens.”

The governmental organizations interviewed included local, regional and European government and law enforcement agencies. The NGOs included recently founded grassroots organizations, religious and highly renowned international NGOs. We also interviewed independent volunteers, as well as citizens with differing degrees of involvement in the context, ranging from a restaurant waiter to heavily involved citizens who frequently helped, some of whom had even founded their own grassroots NGO. Our sample comprises 34 female and 35 male interviewees. The men we interviewed mostly worked in paid activities, while the majority of the women were unpaid. The interviews were between 30 and 154 minutes long. To protect the identity of our field contacts, interviewees and organizations remain anonymous. Topics covered in the interviews involved the interviewees’ experiences in the setting/island, their professional background, the responsibilities of the organization they were affiliated with, and interactions with refugees and other actors in this context. The interviews were steered by semi-structured interview guidelines, using open-ended “broad domain” questions. In response to the accounts of the actors, the researcher often followed up with an invitation to elaborate further on challenges in their work and life, or on other

themes that seemed of interest and related to the research question or which helped to elicit the emotions triggered and sensemaking.

3.3.2.2 Observations

Our observations were conducted at several sites and included visits to the Moria hotspot, the Kara Tepe hospitality center and one semi-formal refugee camp. We observed the work of one NGO in Moria and visited two community centers which provided activities for refugees. We also attended eight inter-organizational meetings which had been organized to share information, as well as inter-organizational meetings which facilitated collaboration and information exchange between organizations for specific services such as basic needs, education or legal support. We conducted participant observations during three nights of volunteering with a group of informally organized individuals who provided first assistance to new arrivals at the shoreline in collaboration with formal NGOs. The first author also participated in a training day organized by both formal NGOs and informal volunteer networks and volunteered with a newly founded NGO which provides basic hygiene services to female refugees living in the camps. Informal talks provided complementary insights. The field team wrote over 100 (typed, single-spaced) pages of field notes (hand-written during the day and typed out the same night or the following day).

3.3.2.3 Supplemental data

We also gathered rich additional data in the form of photographic and video material, background documentation, media reports and various communications from volunteer WhatsApp and Facebook groups. Before, during and after our stay in the field, we followed the news outlets on the topic as well as developments in the national and international media, including social media such as Facebook, and official reports from UNHCR and local inter-agency collaboration meetings. We collected supplemental data to become informed of the context before entering the field, to carry out robustness checks of the information and data collected in the context, and for triangulation in the subsequent data analysis process.

3.3.3 Analysis

We used a qualitative and abductive approach (Alvesson & Kärreman, 2007; Locke, Golden-Biddle, & Feldman, 2008; Mantere & Ketokivi, 2013) to code the data. We implemented three triangulation methods – data, investigator and theory triangulation – and initiated the analysis process through a series of discussions within the field team and with the fourth author, who had the role of exercising critical distance. This helped us with the process of evolving general theory from the data (Alvesson, Hardy, & Harley, 2008).

Our initial discussions produced various themes. In all the interviews and observations in the field notes, we found rich accounts of sensemaking activities and coping strategies. In our further discussions, we repeatedly found salient and primarily unexpected connections as strongly felt emotions and observed the significant share they seemed to have in people’s sensemaking and coping behavior.

3.3.3.1 Comparison across groups

Early insights from our data collection suggested variations in the emotional responses to challenges across different stakeholder groups and in how they coped with the distressing environment. This enabled us to differentiate three role identity groups: citizens, volunteers and professionals (table 3.1). Although we found that some actors had multiple role identities, we identified the most dominant role identity for each individual. For example, a professional aid worker who worked in his spare time as an independent volunteer was considered a professional.

Table 3.1 Number of interviews per role identity

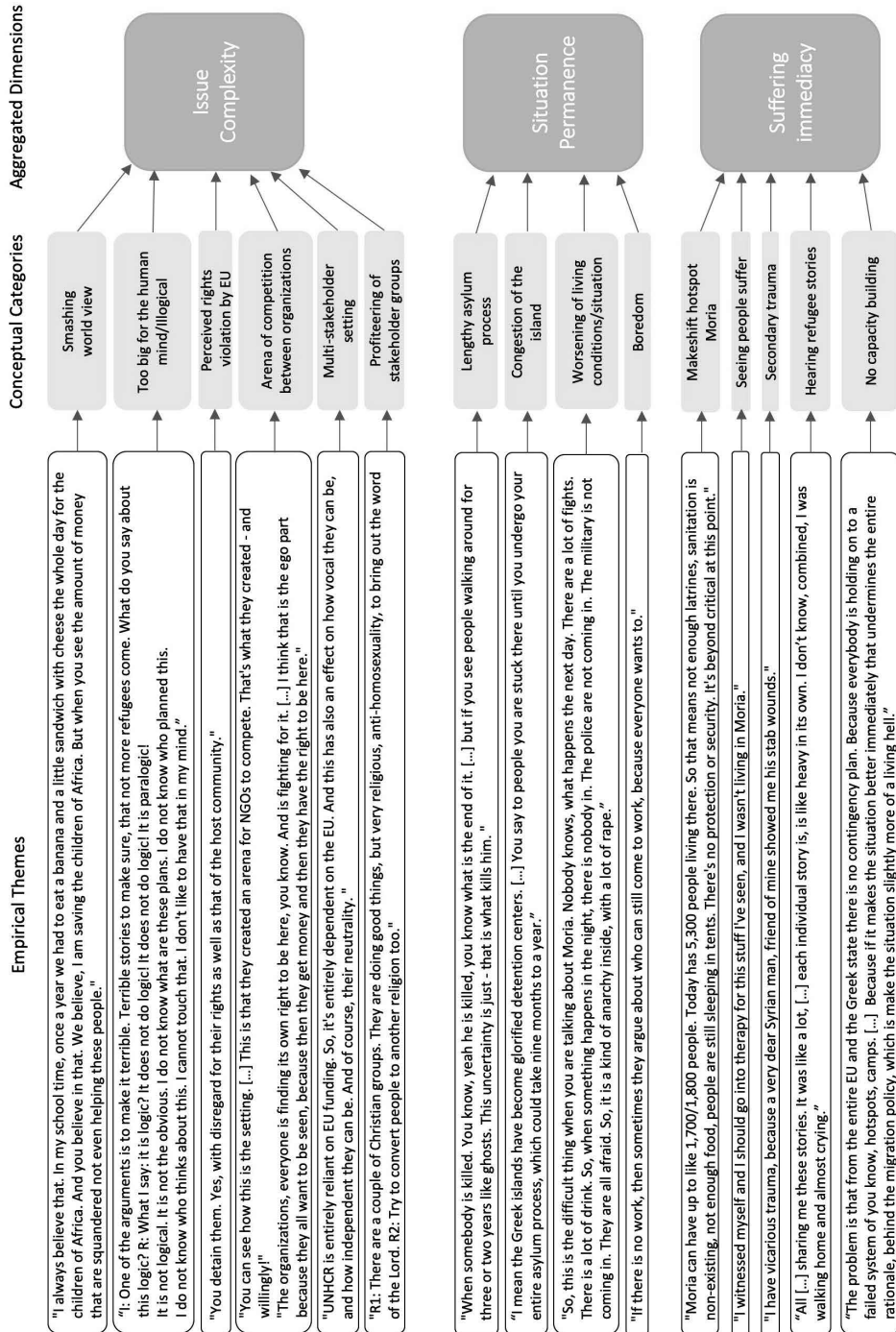
Number of interviews	Role identity	Approach due to role identity
19	Citizens	It’s my home
22	Volunteers	It’s my cause
22	Professionals	It’s my job

Citizens (“It’s my home”) are the only stakeholders who did not deliberately choose to be embedded in the context. The group of volunteers (“It’s my cause”) is a very heterogenous group and is subdivided into short-term, long-term and independent volunteers. Volunteers often started by squeezing in a two-week holiday with “meaning” and came back later for a longer period. We considered helpers who stayed up to six months in the context as long-term volunteers. If they remained for a longer uninterrupted period in the context, we considered them as professionals. This usually resulted in a change in their formal engagement, as very few could afford to work without compensation. The role identity group of professionals is mainly composed of TSOs, and GOs and long-standing aid workers (“It’s my job”) who are used to walking in and out of humanitarian crises as they live their lives from mission to mission. The professional aid workers in our sample were often employed in large and well-known NGOs with good reputations. The TSO employees were working in EU agencies or in international organizations.

3.3.3.2 Breaking points triggering sensemaking

In a further coding instance, we coded each transcript for occurrences that triggered individuals’ sensemaking (Holt & Cornelissen, 2014) in the context. Using an open coding approach, we created a code book with every breaking point that was mentioned (Corbin & Strauss, 1994). First, we collected the breaking points mentioned by the interviewees and then applied an iterative procedure to accumulate similar breaking points into second-order codes. Through our discussions and iterative process, we grouped and merged breaking points according to three aggregated dimensions: complexity of the issue, permanence of the situation and immediacy of the suffering (figure 3.1). These breaking points were saliently accompanied by strong emotions.

Figure 3.1 Coding structure triggering conditions



3.3.3.3 Strong emotions

We consider emotions of displacement, disruption and discomfort as breaking points in sensemaking that trigger the individual sensemaking process (Holt & Cornelissen, 2014), and we coded for strong emotions, often observing mixed or ambivalent emotions. There is consensus in the field of psychology that ambivalent emotions exist (Lomas, 2017; Russell, 1980; Williams & Aaker, 2002).

We took a combined naturalistic and constructivist perspective to conceptualize ambivalent emotions (Lomas, 2017). Taking such a naturalistic stance to examine emotions enables us to classify them neurophysiologically as valence (pleasant-unpleasant) and arousal (active-passive) (Russell, 1980). It also enables us to differentiate five basic emotions – anger, disgust, fear, sadness and enjoyment (Ekman, 1999) – an approach that has been supported by other scholars in the field (Ekman, 2016). In contrast to this naturalistic perspective, the constructionist viewpoint regards emotions as a linguistic construction, created by social dynamics and interactions (Kövecses, 2003; Lomas, 2017). We build on naturalistic models in naming and grouping the emotions identified in our case study, and we refer to a constructionist approach in our subsequent theorizing.

Lomas (2017) states that valence is a key component of all emotion theories and is classified as positive or negative. Hence emotions of a positive valence ultimately create feelings of pleasure and reward, while emotions of a negative valence are associated with opposing and dysphoric feelings. This conceptualization of valence has implications for the conceptualization of ambivalence, which is an emotional state of simultaneously experiencing positive and negative emotions. In general, when we speak about mixed and ambivalent emotions, we are referring to a combination of primary emotions, as indicated in table 3.2, and their specific manifestations on Lesbos.

Ambivalent emotions are a combination of emotions with positive and negative valence (e.g. guilt and pride), whereas mixed emotions are emotions of the same valence (e.g. anger and fatigue). As the level of emotional arousal has proven to be part of the sensemaking process and can have a decisive effect on the resulting behavior (Cornelissen et al., 2014), we include this aspect by drawing on Russell's (1980) circumplex model to add a scale for the strength of the emotions felt: the

vehemence of arousal. We differentiate subsequently between low, medium and high arousal.

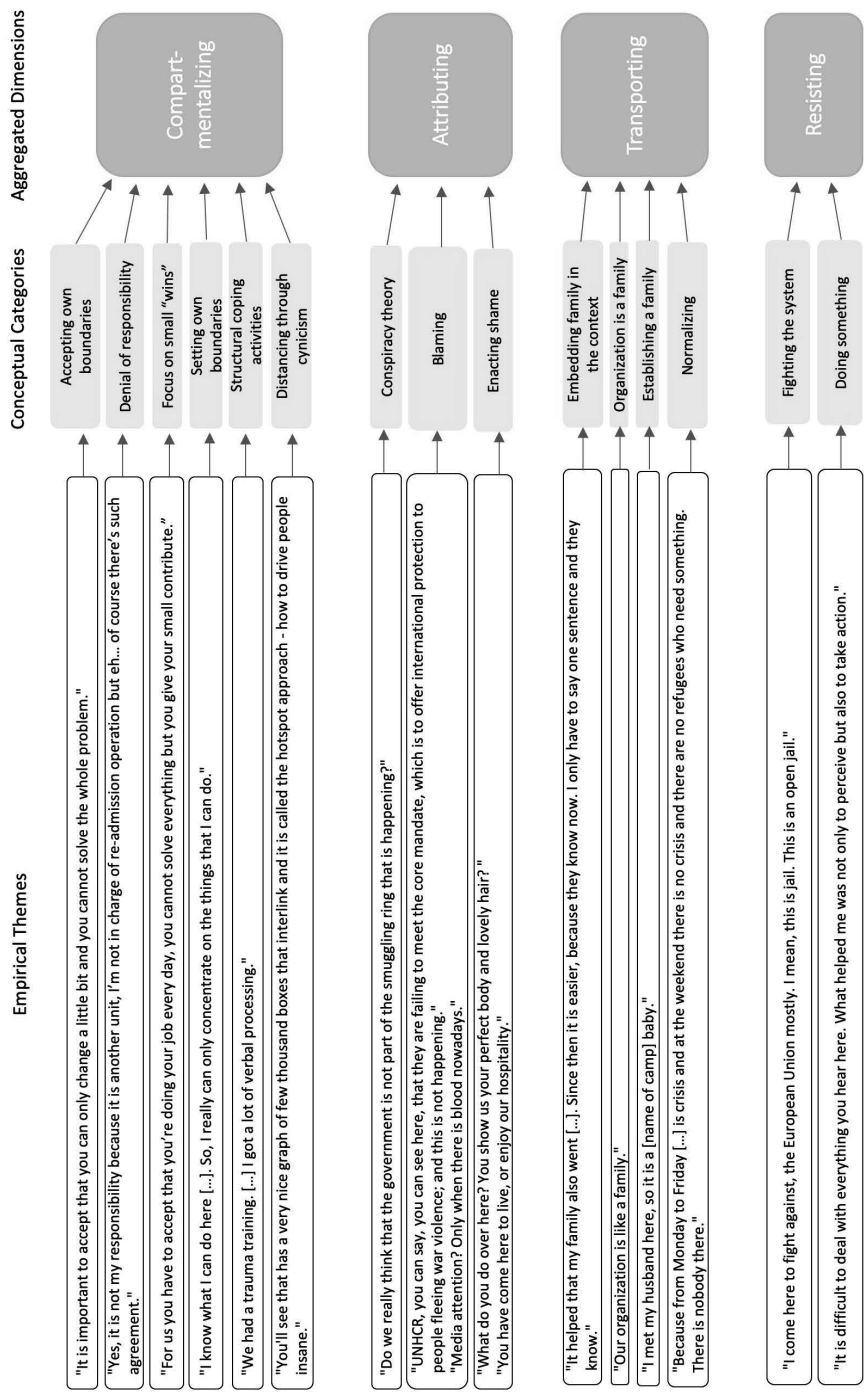
Table 3.2 Core emotions and their occurrences in the case study

Core emotions (Ekman, 1999)	Valence (Lomas, 2017)	Emotions Case Study Lesbos
Anger	Negative	Anger / Pain
Disgust	Negative	Guilt (<i>disgust toward me</i>) Disappointment (<i>disgust toward others</i>)
Fear	Negative	Dread / Weariness / Insecurity / Agitation
Sadness	Negative	Fatigue / Morbidity
Enjoyment	Positive	Pride / Hope / Relief / Gratefulness / Happiness / Fulfillment

3.3.3.4 Coping

The question “How do people make sense and cope with mixed or ambivalent emotions?” was the subject of the following coding instance. Here, we applied abductive reasoning (Mantere & Ketokivi, 2013) by consulting the literature on psychological coping in extreme contexts, including in refugee settings (Bleich, Gelkopf, & Solomon, 2003; Creed et al., 2014; Walkup, 1997), and on normalization because of the special challenge of the permanence of the situation (Ashforth & Kreiner, 2002; Termeer & Dewulf, 2018). We started by coding for known coping strategies and then identified less-explored coping mechanisms that were more applicable to the specific context. We first used codes for coping mechanisms that were very close to the data and then developed more refined first- and second-order codes (figure 3.2).

Figure 3.2 Coding structure coping strategies



Coping mechanisms were repeatedly divided into passive and active coping mechanisms. Passive coping mechanisms entail a distancing component from the triggering conditions, helping to alleviate the immediate suffering but, in contrast to active coping mechanisms, do not tackle the cause of the suffering (De Rond & Lok, 2016; Zeidner & Endler, 1996). In the final formulation of the coping mechanisms presented in the findings, we differentiated between rather passive or rather active coping mechanisms.

3.4 Findings

3.4.1 Conditions triggering strong emotions

3.4.1.1 Complexity of the issue

We found that a major trigger for strongly felt emotions was the highly complex nature of the grand societal challenge of forced displacement. This complexity was illustrated by interviewees who mentioned aspects such as war, the involvement of the West's arms production and sales, as well as the various business models that emerged along the different migration routes. Interviewees also mentioned the interplay of local, regional, national and international decision making and policy frameworks. All these components appeared to be interconnected and, although information on each aspect was partly available, its sheer volume was overwhelming, making processing and coordination difficult.

In our interviews, stakeholders said it was difficult to act in line with their own values and felt forced to revise their views of the world, and were pushed to draw conclusions that challenged their core values and corroded their existing world view. We found this to be particularly the case when highly respected international organizations failed to fulfill their core mandate and when the crisis mode of operating in the context persisted over years. Some stakeholders suspected that the persistence of the situation served multiple purposes of multiple stakeholder groups. They felt that the ongoing emergency mode of operating provided NGOs with a *raison d'être* and fertile ground for their business model, while at the individual level it served some as a forum for CV building, obtaining new skills, self-discovery or enacting religious and political convictions.

3.4.1.2 Permanence of the situation

The European hotspot of Moria was originally designed to accommodate refugees in the short term, with the intention that they would move on after six weeks. However, the majority of refugees have had to endure a prolonged emergency situation, living in camps while waiting more than a year for their asylum claims to be processed. We found that this had also affected local communities, and in some cases had led to conflict or heated debate among the local community over the question of how to best respond to the realities created by the official response to arriving refugees. It had often resulted in the group that no longer wanted to have anything to do with the issue blaming the group that was helping in the response to arriving refugees, alleging for example that they were taking economic advantage of the situation or creating pull factors.

3.4.1.3 Immediacy of suffering

We observed that the touch point for many responders was the immediacy of the suffering they witnessed, which in 2015 was on the shoreline of the island where people arrived but had shifted after three years to the area around the European hotspot of Moria, while most of the arrivals were being picked up at sea by the coast guard or Frontex. We found that Moria constantly housed at least twice, if not three times, the numbers of refugees it was designed for (3,000). No significant capacity building had taken place since 2015, so it remained makeshift in character with sexual assaults, knife attacks and suicide attempts as common living conditions (Boffey & Smith, 2019; Kingsley, 2018; Smith, 2017). It was referred to by several interviewees as a “concentration camp,” the same term used by Pope Francis (BBC News, 2017). Interviewees commonly used the term “detention center” as a synonym for Moria. “Since 2015, the camp has often relied on smaller overflow encampments, but in five visits over the past three years, I had never seen the spillover extend so far” (Kingsley, 2018). Interviewees told us the camp population was in constant fear of clashes between the various national communities and that refugees waiting for months in an overcrowded camp often experienced helplessness, which often led to pathological depression and the acute expression of psychosis and post-traumatic stress disorder (Fontana, 2018; Kingsley, 2018; MSF, 2017). We found that, as well seeing people suffer, hearing the refugees’ stories also

had a strong effect on the psyche of individuals living and working in this setting, to the extent that the physical health of helpers was also affected. What made the refugee stories psychologically so impactful were the reported atrocities and the sheer quantity of dreadful stories told.

The particular context of the response to arriving refugees on Lesbos appeared to be a setting of trauma not only for refugees, who were traumatized once more due to how the response was organized, but also of secondary trauma for the people who were working in the response. From the point that we entered the field, we realized that the context elicited a plethora of strong emotions across all stakeholders. We found that the challenges of the complexity of the issue, the permanence of the situation and the suffering seemed to create the conditions for triggering deeply felt emotions and were the breaking points for newly required sensemaking.

Table 3.3 Triggering conditions for strongly felt mixed and ambivalent emotions

Trigger	Data excerpts
Complexity of the issue	<p><i>“This is one of the things that I find most bizarre, or most perplexing about organizations in humanitarian aid, is that, in actual fact none of us are interested in it ending. [...] From an organization point of view that is not good, because [...] we need to find more crises where people are dying to some extent.” (Volunteer)</i></p> <p><i>“Why all this fear? I don't see a real reason for fear. [...] What happens in their country does not count? [...] you shot them and made them come here. Your production of bombs made them come here. You want to bomb the shit out of them to get money on their back and then you don't want to receive them here. It is a huge failure, the response to the refugee crisis in Greece. It's a huge failure from UNHCR. Let's say from the EU, and then you go down.” (Professional Aid Worker)</i></p> <p><i>“Applications for asylum are ridiculously slow. Ridiculously slow! [...] Now it is also schizophrenic. So, we prevent people from wanting to enter. But on the other hand, just last week, you bomb Syria. So, what on earth is this? Because there is no such thing as one strategy being put forward. You have different actors with different strategies and this whole thing becomes a monumental fuckup! Monumental!” (Citizen)</i></p>

Complexity of the issue	<p><i>“Economically, economically, [...] it’s very difficult and it’s difficult for us also because okay, what, where, why, where do you stand, you know? Of course, we don’t want this kind of eh, people to be hurting. [...] Very soon with 24 percent taxation as well. [...] We all, battle to do our jobs and, to bring our lives here.” (Citizen)</i></p>
Permanence of the situation	<p><i>“We are moving into the third year now, and little has changed. [...] It is confusing to me how nothing can change. How so much can change and how so little can change. [...] They [refugees] are still waiting, they are still struggling to survive.” (Volunteer)</i></p> <p><i>“What signal would it be if one were to come here and after three days has gone through the asylum process and would then be able to travel onwards immediately?” (Professional TSO Employee)</i></p> <p><i>“I have seen that in my life and I have traveled to war zones, to disasters. [...] When somebody is killed you know, yeah, he is killed, you know what is the end of it. [...] It is finished. [...] It is heavy, but if you see people walking around for three or two years like ghosts. This uncertainty is just – that is what kills him. [...]. He cannot do anything. So how will you cope with this? How will I be able to cope with this? Shall I abandon everybody and to leave?” (Professional Aid Worker)</i></p>
Immediacy of the suffering	<p><i>“I was just shocked, because I have never seen the line for food that long [...] and there was a fear, and obviously that fear was rational, that it would run out. And people would just storm in, [...] and the police would come in with electric clubs, you know, and they would start hitting people. And I saw these women and children running and others kind of fighting [...] this blood coming out from the heads of the police and all this thing over food! And that’s something that’s normal to people living in that, they were making jokes saying, ‘It’s just a chicken fight!’.” (Citizen)</i></p> <p><i>“So that means not enough latrines, sanitation is non-existent, not enough food, people are still sleeping in tents. There’s no protection or security. It’s beyond critical at this point. And it’s a disgrace that this is happening inside Europe. It has become like the norm. I don’t think the average taxpayer in Europe is realizing that they’re funding a concentration camp.” (Professional Aid Worker)</i></p>

<p>Immediacy of the suffering</p>	<p><i>“The EU–Turkey statements, this disgusting agreement has created huge mental health problem. Huge! You enter Moria and it takes you one week, and after this you are not a normal person – mentally. There is a huge need in mental health. People get destroyed. [...] How long can you survive this living condition and be sane? The usual estimation is about one week, and then you start... Your brain starts functioning in a different way. You start activating survival modes.” (Professional Aid Worker)</i></p> <p><i>“My son stood back, he was afraid, he, he was nine at the time. [...] And [my daughter] would not leave my side. [...] it’s left an effect on her like, if we have a boat arrive, they’re immediately afraid, they’re not afraid of the boat, afraid of our lives, how it’s going to be affected.” (Citizen)</i></p> <p><i>“I do have nightmares. I sleep fighting. I sleep talking. I shout. I get depressed easily. I get emotional easily. [...] It is a normal reaction. It happens to you when you go through this. You hear stories and it is beyond imagination.” (Professional Aid Worker)</i></p>
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3.4.2 Ambivalent emotions

What makes mixed, particularly ambivalent, emotions so relevant, is the role they play in guiding action. We found that the breaking points that triggered people’s sensemaking in the setting of Lesbos (complexity of the issue, permanence of the situation, immediacy of the suffering) seemed to question humanity in general and European values specifically. Interviewees often described the setting as highly ambivalent e.g. being in Europe, having EU funding available and at the same time witnessing the suffering of vulnerable people. Our interviews often became highly emotionally charged, with emotions that were extreme in valence, closely linked, mixed and often contradictory. Accordingly, interviewees in the setting perceived their emotional responses as ambivalent as well.

In our analysis of emotional responses according to role identity, we found that the level of arousal of emotions appeared to be connected to the time that individuals had actively engaged in the crisis context. Our findings suggest that citizens and volunteers showed a high state of arousal, while professionals appeared to be divided into professional aid workers with a medium level of emotional arousal and professional TSO employees with a lower level of emotional arousal than professional aid workers (table 3.4).

Table 3.4 Mixed and ambivalent emotions triggered

Role ID	Data excerpt	Emotional analysis
I Citizens	<i>“There is a beautiful swimming area near the beach and then you have this marble ground and they have a taverna there. I will never forget what kind of disrespect. They came driving on the marble, skidding the car, turning around, leaving traces of dirt. Getting out of the car, and she goes ‘Eh, excuse me. [...] We are helping these people.’ ‘Oh, look here, it seems we have everything under control. You just ruined my marble, why?’”</i>	<u>Emotions:</u> Pride/ Anger <u>Valence:</u> Ambivalent <u>Arousal:</u> High
	<i>“We have hospitality in our DNA. And of course, I don't feel good. Because we want to give our hospitality in the right way and we cannot. Because the number it's very high. Do you see? We cannot give the right hospitality to all of them.”</i>	<u>Emotions:</u> Pride/ Frustration <u>Valence:</u> Ambivalent <u>Arousal:</u> High
II Volunteers	<i>“It's really mixed. Overall, I'm happy, but, happy that I'm here and I can do something. [...] you can't do everything. You don't set the bar too high. If you can put a smile on someone's face, you've done something. [...] I just get energy here because I'm learning a lot. Which is also a struggle because I feel that I, I am here for the, to gain myself. But this is probably like the battle in my mind, this conflict. [...] I grow myself. That it's, ja, again the gain, it's a very valuable experience for me. [...] I learned to appreciate small things.”</i>	<u>Emotions:</u> Hope/ Content/ Guilt <u>Valence:</u> Ambivalent <u>Arousal:</u> High
	<i>“I like to be independent to have an overview of things [...] I worked for many organizations [...] and of course you have to commit to some policy in the organization. I understand it, but I do not want it here. [...] And the big organizations are talking a lot about nothing. And I hate it! [...] because the meetings make you also tired. When you know all the stories and it goes in, is also not good.”</i>	<u>Emotions:</u> Hope/ Pain/ Disillusionment/ Fatigue <u>Valence:</u> Ambivalent <u>Arousal:</u> Medium

III Professionals

R: “We went there to rescue them. [...] nice to see that, in a few years we managed to stop this large flow because of our activities, [...] but of course after some time they changed their routes, as usually they do. So they start migrating by western Sahara, Mauritania area in, in the desert.”

I: “So they die in the desert?”

R: “Die yes. Yes. [...] It’s, it’s difficult to accept, [...] when you are faced with the biggest problems, no, you cannot solve. [...] For us you have to accept that you’re doing your job every day, you cannot solve everything but you give your small contribution.”

“In an NGO your mandate is very specific [...] of course there are ones that make you more happy. [...] One day we arrived in a center, was really terrible. I mean, really horrible living conditions, and we really made a lot of advocacy, advocacy, personal advocacy, advocacy, in the end, after a few months, that center was closed and people were transferred to a better living place. After that you say ‘Finally, I have an impact.’ [...] The problem with us is the frustration. Sometimes you work a lot and you feel [...] there are not concrete results.”

Emotions:
Hope/Pride/
Disillusion-
ment/
Pain/
Fatigue
Valence:
Ambivalent
Arousal:
Medium

Emotions:
Happiness/
Frustration/
Fatigue
Valence:
Ambivalent
Arousal:
Medium

3.4.3 Coping strategies

However strong the emotions appeared, our findings suggest that all individuals engaged in emotional work in the form of developing coping mechanisms to deal with the distress being experienced. We found a rich repertoire of passive coping mechanisms. This may be because the triggering conditions of the complexity of the issue and the permanence of the situation could not be solved at a local level.

3.4.3.1 Compartmentalizing

A substantial part of coping in this context involved what we label “compartmentalizing,” defined as managing boundaries and definitions. “Accepting one’s own boundaries” was frequently mentioned by professionals and volunteers alike. Respondents felt that due to the imbalances in power they could not change

the institutional context but could only make a difference in their little “sandbox,” where they had direct agency.

Related to this was a coping behavior that distanced a person from being an acting agent, which we label as the “denial of responsibility.” We found this coping mechanism mostly within the professional group, especially GO and TSO employees. Questions about how people dealt with the challenges were typically answered by attempts to put the current suffering “into perspective,” by comparing the situation with atrocities committed against refugees in other contexts and other geographical areas. Furthermore, interviewees often stressed here that the organization they were affiliated with only had a local-authority-supporting mandate. In this way, individuals were able to separate themselves from stigmatized aspects of the work, such as deportation:

“As I said, we don't decide destinies either. We are only the first registration. All that follows is the Greek Asylum Service, which makes the decision.” (Professional TSO Employee)

We also observed a shift in the focus of the stakeholders toward small “wins” and a redefinition of what “making a difference” meant. Before they came to work on site, several interviewees had mistakenly thought that they could “really change something.” It was only when they came on site that they realized this would entail systemic change at a macro level. Thus, they redefined “making a difference” as being at the individual level, i.e. making a difference to a person’s life. A frequently mentioned “small win” was when a child smiled, implying that if they only made one child smile then they had achieved something as a result of their efforts which justified their own presence in the context.

Another example of coping through compartmentalization that we observed was through structural coping. By structural coping we mean that coping was supported by the organization, for example through reflective talks with the team, or the organization advising their staff to have a fixed physical exercise workout schedule or to set up feedback meetings. We found that the established organizations in the setting were aware that staff needed to process and cope psychologically with the distress created by the context and they therefore offered support for creating distance from the experience. These organizations aimed to prevent staff from the downward spiral of working too much, a well-known reaction to emotional distress

(e.g. guilt, rejection or frustration) in workers who are new to a crisis setting when they realize the limits of the impact they can make.

“We had trauma training. Just to talk about it being okay, it’s okay to have a little trauma. Life is not really that great in that time. I had pretty sketchy dreams. Like guns pointed at people’s heads. [...] I think, that was my brain. They said, that’s normal, that stuff happens. Knowing that it was normal to have those violent things, that it’s okay, that is just our body responding to stress.” (Volunteer)

Interviewees repeatedly reported having emotions such as: severe physical, emotional, and mental exhaustion; acute tension; chronic fatigue; sleep disorders; depression; reduced coping capacity; negativism; apathy; cynicism; and anger.

“They called it ‘The Hotspot Approach’ and you’ll see that has a very nice graph of few thousand boxes that interlink and it is called ‘The Hotspot Approach’ – how to drive people insane.” (Citizen)

“The international maritime law, which describes exactly what you have to do when you see a shipwreck. Violated! Libya a safe country? Can Europe please tell us who the fuck is ruling Libya, because I don’t know.” (Independent Volunteer)

3.4.3.2 Attributing

Another overarching coping mechanism we refer to is “attributing.” We observed that, when people realized that a situation was ongoing despite all their work and good intentions, some stakeholders engaged in scapegoating and attributing failure to other stakeholder groups by developing conspiracy theories. The EU, the Greek state, the municipality, NGOs, UNHCR, the media, helping locals and Turkey/Erdogan were all blamed. No stakeholder group was spared apart from one: the refugees. One aspect of this attributing was a more active coping behavior, the “enactment of shame,” with the aim of manipulating the behavior of others. In a context where much of the work was conducted by unpaid, often female workers, “enacting shame” seemed to be a coping mechanism for exercising disciplinary power.

“You come here to help? Help! Do it! Prove it! What are you doing over here? You show us your perfect body and lovely hair? No, we need help. Do it!” (Professional GO Employee)

Unlike “blame,” the enactment of shame was directed at the refugees, e.g. by reminding them that they were in the position of petitioners, stressing their subordinate status as beneficiaries of a gift.

“So of course, nobody has bought land over here. You have come here to live, or enjoy our hospitality [...]. We do not ask for asylum over here, because it is not our case. But you came over here to live here.” (Professional GO Employee)

3.4.3.3 Transporting

We label a moderately active coping mechanism “transporting.” As well as referring to transporting oneself to another time and place, it also included bringing one’s own family into the context. Embedding loved ones in the field frequently happened when talking was not enough and failed to convey the reality. This coping mechanism can be attributed to the permanence of the situation and partly by the fact that the “field” was situated in Europe, on a holiday island. The resentment that is often felt when professionals’ family members are flown into the crisis context, for example in contexts of natural disaster, armed conflict or famine, did not exist on Lesbos, as it remains a beautiful tourism island. So, many professionals and volunteers opted to fly in family members.

“Well, it helped that my family also came here – this last year. So, my husband worked at the camp 3 or 4 times, and also my children that are 15 and 17 were here a few times and that helps. Since then it has been easier, because they know now. I only have to say one sentence and they know.” (Volunteer)

“There are many colleagues who let their family come here. As I said, there are enough possibilities to have a nice day here.” (Professional TSO employee)

In some cases, this “transporting” notion of coping was taken to a different level, which we coded as “establishing a family” in this context. We found the permanence of the situation to be sufficiently stable for numerous people to get together, have children and set up a family – within and between stakeholder groups. Normalization sets in. However, the humanitarian needs in and around the Moria camp meant there was no distinction between weekdays and weekends. Nevertheless, significantly fewer staff, including doctors, worked at the weekend.

3.4.3.4 Resisting

We define the most active coping mechanisms as “resisting,” in which the most targeted form, in terms of tackling the actual psychological stressor, was a behavior which we coded as “fighting the system.” Interestingly, we found this coping mechanism not just in anarchistic activist groups, but also among professionals,

including TSO employees and local governmental actors as well as throughout NGO volunteers.

“I come here to fight against, the European Union mostly. I mean, this is jail. This is an open jail.” (Volunteer)

“I want to change things so that I don’t need someone to provide blankets. They should somehow change the policies or change the situation in the famous bigger picture so that there is less need of that.” (Professional TSO Employee)

We found that the individual sensemaking of how to best facilitate this objective of fighting the system took varying forms. It could be trying to make a change at a macro systemic level through the work of the organization the individual was affiliated with or through the individual’s work toward the overall organizational goal, e.g. using the law and helping refugees to navigate the bureaucracy of the asylum process. We also observed that fighting the system meant not playing by the rules of the existing system – a behavior people felt entitled to as they perceived other decisive actors “in the game,” e.g. the EU and the Greek government, not to be playing by the rules either. As a result of the frustration over the Greek government’s incapacity or unwillingness to tackle the permanence of the situation on Lesbos, the municipality bypassed the next official communication level, namely the Greek government, and engaged in dialogue with responsible European politicians directly.

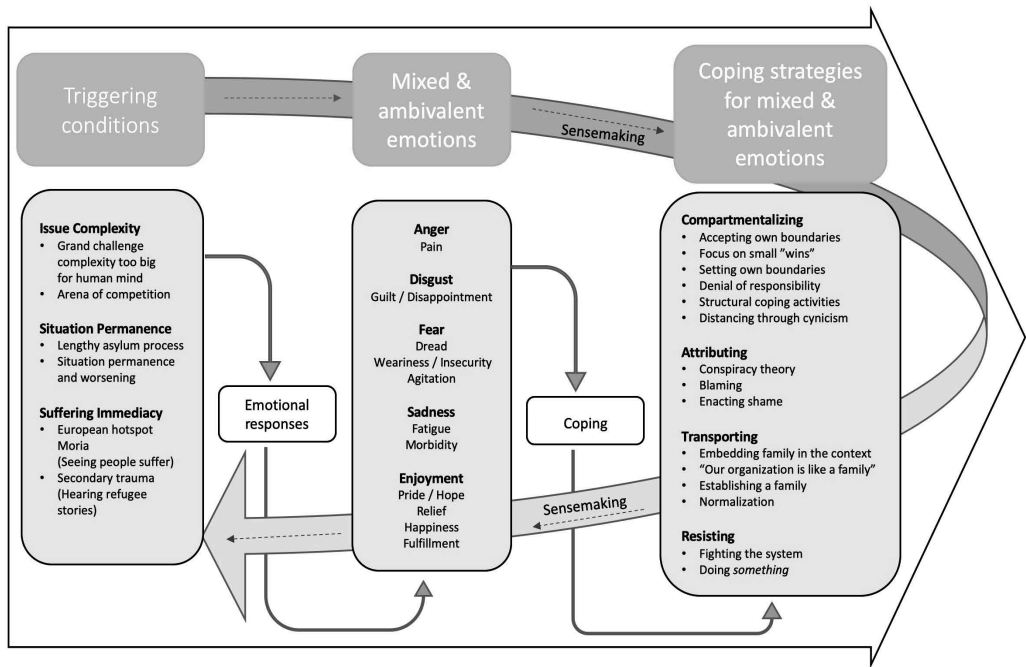
The “resisting” coping mechanism in some cases took on a less pronounced form and became diluted into “just doing something.” We observed that some people working in the refugee response were frequently bored. Nevertheless, even though people were situated on a holiday island, they were not able to make the difficult switch between emergency response and relaxing or enjoying a vacation. Thus, people were frequently looking for other ways to stay active, e.g. engaging in spotting activities on the shoreline. However, most of the pick-ups of refugees and the moving of refugees from unstable dinghies to sophisticated border control vessels were normally conducted at sea to avoid unstable dinghies hitting the difficult-to-land-on Lesbos shorelines. This made it unlikely for spotters to see any landings at all. We found that this coping mechanism again produced a situation that volunteers had to deal with, as, for example, being at the beach looking out for

a boat made them want to see a landing, but at the same time they felt guilty because of what this wish would entail.

3.4.4 Theorizing prototypical pathways

Having identified the triggering conditions for mixed and ambivalent emotions and coping mechanisms, we found that we were not looking at a linear sensemaking process with a start and an end, but rather a cyclical process model in which various coping mechanism produced realities that either the individual and/or others in the setting had to make sense of and cope with once more (figure 3.3).

Figure 3.3 Overall process model coping with mixed and ambivalent emotions



The result of our final analysis step was a description of the prototypical pathways along the three role identities: citizens, volunteers and professionals. Although the cyclical pathway model answers our research question (“How do people make sense of a grand societal challenge on the ground, what emotions do they form and how do they cope?”), we do not suggest that the pathways identified exhaust the entire scope of possible emotions and coping trajectories, nor that specific individuals do not engage simultaneously in other forms of coping. However, the pathways (tables 3.5 & 3.6) that we distinguished were the most salient ones, and cyclical elements of these pathways displayed a reciprocal and dynamic relation between emotions and coping (figure 3.4).

Table 3.5 Six coping pathways

Role identity	Sensemaking Passive Coping	Sensemaking Active Coping
Citizens	Attributing path Blaming others	Identity path Exercising Greek hospitality and humanism
Volunteers	Reframing path Shifting focus	Independence path Emancipation from organizations
Professionals	Sandbox path Focusing on agency	System solution path Adjusting career

3.4.4.1 Citizens – Attributing and identity paths

Crucial pillars of the existence of citizens were directly affected: family, property, income streams, values, identity. Many citizens expressed desperation and felt abandoned by their government and by the EU, not only in relation to the emergency response in 2015, but also economically in the years that followed when tourism moved away and businesses collapsed. The response from TSOs, GOs and NGOs

was partly perceived as a hostile takeover. There was considerable anger and frustration in the largely shared perception that the refugee situation continued to produce daily human misery on Lesbos. Many citizens perceived it as a disgrace that refugees were forced to live under dire conditions on their island, as this was utterly opposed to what they considered to be a proud part of their Greek identity – their renowned hospitality. Citizens were suffering severely from the permanence of the situation and the disruption in local communities, and many feared that the situation was a ticking time-bomb about to explode, resulting in violence, destruction and negative media attention. We found that citizens were simultaneously exposed to all the triggering conditions described over the longest time period, with manifold coping mechanisms.

Table 3.6 Examples of emotional sensemaking pathways

Role identity	Sensemaking Passive coping	Sensemaking Active coping
I Citizens	Attributing path	Identity path
	<i>“Maybe our anger turned more to these organizations than it should have. But it was like a hostile takeover. Simple as that.”</i>	<i>“It’s a hell. So, we try to help them, we try to help the vulnerable cases, I mean their families, people with disabilities and many others. Bring them to a safe and right place. [...] we have hospitality in our DNA. And of course, I don’t feel good. Because we want to give our hospitality in the right way and we cannot. Because the numbers it’s very high. Our house is for 600 people and the house had 4000 people. [...] We cannot give the right hospitality to all of them. [...] we have this like a flag, ‘Do the best and help the people over there.’ That is our duty. That is our responsibility.”</i>
	<i>“In my opinion, I believe [...] the government in Greece and all of Europe, I believe that this is only looking for money.”</i>	
	<i>“And the municipality said, ‘It is not from me, it is not from me, it is from the government.’ So, we don’t have a municipality level? We go to the government, to Tsipras?”</i>	
	<i>“The last one was, I think the Washington Post, ‘The island of despair’ [...] Why don’t you call it the camp of despair?”</i>	

	Reframing path	Independence path
II Volunteers	<p><i>"I can't carry their burdens all the time. I can for a period of time. [...] I think it comes down more to an emotional thing. A physical thing too. I am not a refugee, they are refugees. That doesn't make your identity, but that's where they are in life right now. I am not in that. That they live in those situations doesn't mean that I should live in those situations."</i></p>	<p><i>"It is a way to, you know, you know the system and you go around it. They are asking me several time why I have not applied for European funds. If I apply to European funds, I have to obey European laws. The European laws are hacking my freedom. Not my freedom only, anybody's freedom."</i></p>
	Sandbox path	System solution path
III Professionals	<p><i>"I don't know how to solve the whole thing. I know what I can do here to make the situation a little more bearable for people and hopefully make the future a little bit better for them. So, I really can only concentrate on the things that I can do. I can't think about the big shit show. It would make me insane."</i></p>	<p><i>"You realize, if you want to change a bit of the situation, you need to work at a higher level, different level. You will never, ever achieve the result in one to two years but maybe you can work in changing the full policy and step by step you can have a broader result."</i></p>

Citizens on the attributing coping path were exposed to the complexity of the issue, permanence of the situation and, depending on the level of their engagement, to the immediacy of suffering. This accumulation of triggering conditions seemed to create, among other things, fatigue regarding the permanence of the situation; pride in how they were helping; weariness about their jobs and income in the face of a tourism crisis; guilt for thinking about their future in the face of the immediacy of others' suffering; and insecurity about what to think of the over-complex issue. We observed that, in many cases, the ambivalence of these emotions was coped with passively, through attributing. As conditions did not seem to change over time, some people appeared to make their sense of the world by concluding: "The media is bad. The EU is bad. The Greek state is corrupt. NGOs are bandits." Such conclusions left citizens on this coping path with almost the same sentiments that they started

out with, leading to compartmentalization and withdrawing from the issue where possible.

In contrast, we found that some citizens coped rather actively on the identity path, with their actions stemming from their pride in being descendants of humanist philosophers and the Greek culture with its renowned hospitality, while at the same time being well aware that their ancestors were themselves refugees from the Ottoman empire. These identity-related emotions of pride were mixed with emotions of anger about the lack of an EU response in 2015. When a response occurred that was not in line with their values, they coped actively by resisting, by exercising their values of Greek hospitality and humanism. They thus created their own refugee camp, Kara Tepe, which is under the responsibility of the municipality. In 2015, Kara Tepe was bursting at the seams, and the people who were involved from the municipality could not be considered professionals in terms of our categorization. Rather, they were citizens responding to an acute emergency on their island, making sense and resisting by creating a counter-solution to the Moria hotspot. However, as Kara Tepe was overcrowded in 2015, this left citizens again with ambivalent feelings of being proud of providing shelter but feeling guilty for not exercising their hospitality in the right way, exposing them again to the immediacy of suffering triggering condition. As opening a second municipal camp was not an option, we observed that coping then shifted to a different coping mechanism: compartmentalization. This was frequently manifested in the form of boundary setting and concluding what the limits of the camps' capacity were to be able to continue to provide hospitality in line with Greek values and identity.

"We don't give up and we hold our position, because we have hospitality in our DNA. And of course, I don't feel good. Because we want to give our hospitality in the right way and we cannot. Because the numbers are very high. [...] We cannot give the right hospitality to all of them. [...] we have this like a flag, 'Do the best and help the people over there. That is our duty. That is our responsibility.'" (Citizen & Professional)

Figure 3.4 Prototypical pathways

Role ID	Coping type	Coping paths	Triggering conditions	Emotions	Sensemaking	Coping	Triggering conditions	Emotions	Coping
Citizens	passive	Attributing path (Blaming others)	Issue complexity Situation permanence Suffering immediacy	Fatigue, Guilt, Anger, Pride, Weariness, Insecurity	"Maybe our anger turned more to these organizations than it should have. But it was like a hostile takeover. Simple as that."	2 Attributing (Blaming EU, State, NGOs, media)	Issue complexity Situation permanence	Anger, Pride, Frustration	1 Compartmentalization (Setting own boundaries)
	active	Identity path (Exercising Greek hospitality and humanism)	Issue complexity Situation permanence Suffering immediacy	Pride, Anger, Shame	"We have the hospitality in our DNA. And of course, I don't feel good. Because we want to give our hospitality by the right way and we cannot."	4 Resisting (Fighting the system)	Situation permanence Suffering immediacy	Guilt	1 Compartmentalization (Accepting own boundaries)
Volunteers	passive	Reframing path (Shifting focus)	Issue complexity Suffering immediacy	Fatigue, Shame, Guilt, Disappointment/ Disillusionment	"If you can put a smile on someone's face, you've done something."	1 Compartmentalization (Small "wins")	Situation permanence Suffering immediacy	Anger, Frustration	1 Compartmentalization (Structural coping)
	active	Independence path (Emancipation from organizations)	Situation permanence Suffering immediacy	Fatigue, Anger, Frustration	"You have to commit to some policy in the organization. I understand it, but I do not want it here. (...) And the big organizations are talking a lot about nothing. And I hate it!"	4 Resisting (Fighting the system)	Situation permanence Suffering immediacy	Sadness	3 Transporting (Return to family) ----- 1 Compartmentalization (Structural coping)
Professionals	passive	Sandbox path (Focusing on agency)	Issue complexity Situation permanence Suffering immediacy	Disappointment/ Disillusionment, Fatigue	"We don't decide destinies either. We are only the first registration. All that follows is the Greek Asylum Service, which makes the decision."	1 Compartmentalization (Denial of responsibility & structural coping)	Situation permanence Suffering immediacy	Disappointment → Anger → Fatigue	3 Transporting (Return to family) ----- 1 Compartmentalization (Cynicism)
	active	Systemic solution path (Adjusting career)	Suffering immediacy Situation permanence	Disappointment/ Disillusionment, Fatigue	"You realize, if you want to change a bit of the situation, you need to work at a higher level, different level."	4 Resisting (Fighting the system)	Situation permanence Suffering immediacy	Fatigue	3 Transporting (Normalization)

3.4.4.2 Volunteers – Reframing and independence paths

We found that the most immediate trigger for deeply felt emotions in the group of volunteers was the immediacy of the refugees' suffering which they experienced during their voluntary work, especially the deteriorating mental health of refugees due to the permanence of the situation. Volunteers new to the setting reported that they were often unable to engage in coping at all. When volunteers started seeking answers, they often appeared to be overwhelmed by the issue's complexity and the realization of how little impact they had on something they considered to be their cause. They were often equally overwhelmed by the overabundance of emotions they were feeling, to the point where they reported no longer feeling anything at all.

"In the beginning I was clogged up and couldn't say anything." (Volunteer)

After a while volunteers started coping with the distress they were experiencing by trying to bring things back to a smaller scale by pursuing the reframing coping path. Volunteers then seemed to focus on small "wins" in the field and to reframe the contribution they were able to make. A typical reaction in a refugee setting is for volunteers to still be able to "experience themselves as active persons without having to confront the fact that some of their work did not necessarily help to reach the set goal of the organization, namely to help the refugees" (Florian, Costas, & Kärreman, 2019, p. 17). When volunteers stay in the setting for a longer time, the emotions of frustration, helplessness and fear have to be coped with continually as one of the tasks they handle. In these circumstances, we observed a shift to them accepting their own boundaries and scheduling structural coping into their weekly routine.

Unlike in reframing and compartmentalization coping behaviors, another group of volunteers coped more actively through resistance and fighting the system. We found that independent volunteers were particularly frustrated, angry and tired of organizational constraints and realities, such as organizations' overheads, politics and dependencies, which in their opinion did not help to alleviate the ongoing suffering of the refugees. Volunteers on what we name the "independence path" broke free from any organizational affiliation, but they had no intention of founding their own grassroots NGO. They particularly valued not having to serve any organization and being able to act in a more independent way, being vocal about

their opinions and more effective in the use of monetary resources as no overheads had to be financed. Nevertheless, they did cooperate with the organizations on site. Depending on where a gap in provision was identified, they attempted to fill that gap by working with the organizations whose responsibilities were closest to the gap. They also used informal networks that had evolved over the years since the situation first arose, with particularly strong ties between people who were first responders in 2015.

3.4.4.3 Professionals – Sandbox and system solution paths

Professionals had seen settings similar to those on Lesbos many times in other parts of the world. In addition to having these experiences, most professionals received ongoing training and therefore seemed better able to deal with the complexity of the issue compared to the other two groups. Nonetheless, for this group, the combination of the permanence of the situation and the immediacy of the suffering triggered strong emotions and led to them questioning the whole system of international aid, migration and geopolitics.

We named coping which radiates around agency in closely defined boundaries “the sandbox path.” We found that a well-represented coping mechanism in the group of professionals involved creating limits to one’s responsibility, helping the individual to create distance from the triggering conditions. On this path, professionals were simultaneously trying to cope with the immediacy of the suffering when directly dealing with individual refugees, the complexity of the issue and the permanence of the situation. As professionals, they approached things with an “It’s my job” attitude and thus frequently coped through compartmentalization. They focused exclusively on their tasks and small “wins” by creating clearly defined agency sandboxes for individuals and organizations, and coped structurally through regular feedback sessions and fixed scheduled physical exercise. Nevertheless, these sandboxes also had triggering conditions, e.g. constantly having to listen to refugees’ stories. Some people who had been in the setting for a longer time applied the moderately active transporting coping mechanism by embedding their family or establishing families in the setting.

Emotions are triggers for coping and sensemaking and, although coping is a means of alleviating the distress people experience, adjusting one’s professional

career can be considered as making sense of emotions and drawing consequences from it. We called the most active coping path the “systemic solution path” as it involves expanding impact at a systemic level. In the field, we observed a prototypical professional evolution of individuals whereby they started to volunteer for a short period of time and then came back for a longer stay. This could be the start of a career path, moving from informal engagement to become a paid aid worker for an international aid organization working at a global level e.g. with UNHCR or a European agency. Such career paths are typical in the field of humanitarian aid. We found them to be connected to the cognition process of tackling root causes and creating leverage points for solutions to grand societal challenges that lie at a systemic level or at a higher organizational level. Thus, proceeding on this path can be considered to be sensemaking and an active coping mechanism for the lived experiences of global grand challenges.

“I started with the NGOs and then I had the opportunity to join the UNHCR. I’ve been working five years for UNHCR in Africa and then [...] joined EU agency. I’m married, with a child. Some duty stations in Africa they are not for the family. [...] And also, it interacts because in an NGO your mandate is very specific. [...] Then you realize, if you want to change a bit of the situation, you need to work at a higher level, different level. You will never, ever achieve the result in one to two years but maybe you can work to change the full policy and step by step you can have a broader result.” (Professional TSO Employee)

We observed this typical career path in our data, and 11 interviewees had proceeded or articulated their wish to proceed on this path.

3.5 Discussion

Strong mixed or ambivalent emotions trigger the need for sensemaking and may partly have been the result of multiple role identities, forcing stakeholders to switch e.g. from students to volunteers, to gatekeepers of clothes, culminating in the telling question: “Who am I to say that they cannot take it?” Identity work and sensemaking differed greatly in the context. Some retreated from the setting when questioning the meaningfulness of their deeds, while others thrived, claiming “I found myself!” In some cases, especially in the case of volunteers, it even seems as if people were longing for strong emotions. The personal growth it entailed was one motivation for

exposing themselves to such a challenging setting in the first place, seeking out encounters that most people try to avoid. However, when exposed to the distressing living reality, a certain normalization sets in and people engage in diverse coping activities.

We found that when people reported about the distress they were experiencing, there seemed to be an automatism in place that made them, after expressing positive emotions (e.g. pride for provided help), automatically express negative emotions (e.g. guilt for thinking of oneself or not helping enough). Overall there seemed to be a “consensus” among many citizens and NGO workers that one had to end up with negative valenced emotions – an obligation born out of the context. Whatever the causes, this “emotional consensus” supports a “dysphoric mood landscape” in the context in which large sections of stakeholder groups live and work. The closer people are to the living realities of individual refugees, the bigger the surrealism feels. The further away people work on the issue, the more they perceive it as a handled crisis management response that will not trigger strong emotions.

When considering the differences between role identity groups, the emotional responses of professionals seemed to be more controlled, as triggering conditions were perceived to be part of the job. The triggered emotions were often resolved by focusing on the agency actors had or by expanding their impact by changing the organizations they worked for, thereby intending to increase agency through facilitating a systemic solution. As volunteers were normally not engaged for such a long time as professionals, they tended to opt for reframing the impact they were capable of making and focus on small “wins.” Young people, in particular, had many ambivalent feelings, with a high level of emotional arousal. In contrast, older volunteers had a clearer and more balanced state of mind. Some were so fed up with the institutionalization of the emergency mode of operating in the crisis response that they chose not to affiliate themselves with any organization and to act independently.

In the case of the citizens who lived in close-knit communities, daily stories of refugee suffering continued to trigger strong and ambivalent emotions even if the citizens were not exposed to or included in the direct response. Nevertheless, many citizens felt the humanitarian pain on the one hand and pressing economic worry about tourist absenteeism on the other hand. While some engaged in ongoing circles

of attributing, others recrafted their identity and created active alternatives to the national and international approaches to crisis management, whether by cooking for refugees or setting up alternative camps. Over the years, a role identity switch had taken place and local residents in charge of the Kara Tepe camp could now be considered professionals. Interestingly, this also seems to have had an effect on their coping mechanism, as people had engaged in compartmentalization through drawing their own boundaries, focusing on their little sandbox and exercising power where they had agency. However, these coping activities created the next triggering conditions for strong emotions, such as guilt and fatigue, in the face of the challenging task of conducting triage that they then had to cope with once more.

“Because it is not fair for the others. For me it's cancer. It is disease. I cannot sleep. [...] I know many families were in the hotspot yesterday, all day. [...] I come back, and I don't like to eat. I am not a politician, I'm operational.” (Professional GO Employee)

Coping mechanisms also seemed to be linked to different stages of tenure and development in an emergency setting, but not every individual progressed in the same order. It is very likely that individuals had their own set of preferred coping mechanism that evolved over time but also entailed an element of moving back and forth between coping strategies.

3.6 Limitations, implications and new research directions

First, our case study is set in the exceptional geographical, socio-historic and cultural context of the aftermath of the refugee response crisis on Lesbos. It is likely that the social acceptance, arousal and expressions of emotions differ between different cultural backgrounds and between individuals. Second, although the number of our interviews was equally distributed between females and males, we realized that (resembling the context on Lesbos) the men we interviewed worked to a significantly greater extent in paid activities and held higher positions, while women often worked in unpaid activities. This had an effect on power relations and possibly on the verbalization of and coping with emotions. A deeper investigation into these research areas in this context appears to be warranted. Third, the coping strategies we identified were retrieved to a large extent from our interview data and

field notes, which bears the risk of missing out coping strategies that interviewees were either not conscious of or which they wanted to hide. Fourth, we do not claim that each of the prototypical pathways portrays the sensemaking journey of every individual in this role identity, nor that the pathways represent the full palette of possible emotional sensemaking and coping. They reflect typical emotional responses to triggering conditions in a noteworthy group of individuals in the prolonged emergency context of Lesbos. The intention was to identify categories, not to exhaust them. This also applies to our questionable analytical decision to combine the enormous diversity of NGO, GO and TSO workers and employees into a role identity group called “professionals,” by focusing on the tenure of individuals. It would be interesting to investigate whether individuals who proceed on the prototypical career path and work at the TSO level are actually capable of having an impact in the form of systemic solutions to grand challenges or whether they again merely exercise individual coping.

3.7 Conclusion

This article contributes to the growing literature on emotions in sensemaking by offering a portrayal of people’s emotional responses to triggering conditions and an examination of the different natures of mixed and ambivalent emotions through the categories of valence and arousal and unveiling the various coping mechanisms. Furthermore, we carved out prototypical pathways for different role identity groups and created a process model with cyclical elements. We deliberately did not focus exclusively on one stakeholder group but juxtaposed the main actors to show how the emotions evoked in individuals of different role identities inform their sensemaking. With the intention to create a well-balanced account of stakeholders, we also opted to examine the issue at both the macro and micro levels. We found many passive coping mechanisms, possibly due to the permanence of the situation and complexity of the issue, as these triggering conditions are systemic and cannot be solved at the local level of a small holiday island. What makes this especially problematic is that we found implications that a culture of passive coping mechanisms presents obstacles for systemic change.

Although scapegoating was a widely applied coping mechanism, not a single person blamed the refugees. For us, this is strikingly different to the currently dominant populist political and media discourse on refugees and reiterates our finding that the intense emotions triggered by proximity to the concrete situation powerfully channel sensemaking processes. As organizational researchers, we like to advocate that organizations assist their members in understanding, accepting and working with their often-ambivalent emotions, and take them as the valuable asset they can be to facilitate positive change.

Chapter 4

Welcome to the “shit show”: Leveraging emotions for theory building^{1,2}

*Compassion is an unstable emotion.
It needs to be translated into action, or it withers.
The question is what to do with the feelings that have been aroused.*
– Susan Sontag

This essay is a methodological reflection on conducting research in extreme contexts, the impact of this on researchers’ emotions, and its subsequent use in theory building. The essay draws on personal experience of conducting research (see Chapter 3) on the Greek island of Lesbos in the aftermath of the European refugee crisis in 2017 and 2018. It contributes to the methodological discourse on emotions by suggesting including them in the context of reflexive practices and theory building, particularly for management research

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²The term “shit show” originates from an interviewee’s answer: “We call it the ‘shit show’ to be honest. [...] The number we are talking about, really isn’t so big that Europe can’t deal with it. And it’s just a lack of political will. And where is all this money going? I mean, there is people living in Moria camp now, and winter is like weeks away. They haven’t even got summer tents. [...] It’s just politics. [...] It’s wanting to discourage people from coming. It’s wanting to make an example. [...] It’s just plain inhumane mismanagement. [...] The shit show doesn’t start on this island, it’s starting in the countries that people are being forced to leave. You know, most of them, they would love to go home.” (Professional Aid Worker)

conducted in extreme contexts. Here, the essay adds to the literature on extreme context research, spanning both the macro perspective of global grand challenges and the micro perspective of individuals' emotional burdens. It proffers the metaphor "settled emergency" to describe a multifaceted situation encountered in the field that can also be found in many organizational contexts in which an unbearable situation is perpetuated by informal dynamics.

4.1 Introduction

*"You need a lot of commitment if you want to do some research on any aspects of this and I hope you come back."
(Lesbos 2017, Professional Aid Worker)*

Researchers are not rational data processing machines that can disregard their own emotions at will. And yet, the dynamics between researchers' emotions and theory development are still a major blind spot in scholarly attention. In order to continuously improve the quality of sociological studies, a more comprehensive understanding is needed: How do researchers' emotions influence theory development? This is an essential question about extreme context research in management and organization studies (Hällgren, Rouleau, & De Rond, 2018).

In recent years, emotions have spiked quite some interest in organizational theory (e.g. Creed, Hudson, Okhuysen, & Smith-Crowe, 2014; Lok, Creed, DeJordy, & Voronov, 2017; Toubiana & Zietsma, 2017). The literature on institutional theory, social movement theory, and identity theory contains a sizeable amount of work on emotions. Yet, the literature on sensemaking and theory development has so far produced a rather limited amount of references to them (Zietsma, Toubiana, Voronov, & Roberts, 2019).

However, scholars acknowledge that researchers' emotions are important, concluding that compassion plays a role in conducting research (Dutton, Worline, Frost, & Lilius, 2006). Whiteman (2010) laments that emotions are taken seriously as a valid subject of investigation in organizations, but that researchers' "own aches in the face of [...] research tend not to be" (p. 331) investigated. She makes the case that, in addition to their compassion, scholars' heartbreak should also be taken seriously, but she remains vague on how to do this methodically. I can very much

relate to this statement, since I experienced the impact of my own emotions in my research on Lesbos. Indeed, conducting research in extreme contexts is very likely to expose researchers to situations that trigger deeply felt emotions. Thus, a considerable emotional toll is to be expected and can, to a degree, be prepared for. However, for now, researchers are left to their own devices to modulate the impact that heartbreak has on their research.

The research context on Lesbos was extreme due to a wide array of factors: the suffering of refugees, the impact of their suffering on locals and helpers, the overwhelming complexity of a multi-level stakeholder situation, and the utterly paradoxical nature of the setting. The conditions confronted everyone with challenges that were way out of the norm, forcing them to deal with stressful situations that provoked strong emotions (Chapter 3). Clearly, this included the researchers immersed in this situation, thus also me.

At first, I felt that these experiences were exceptional, but conversations with colleagues and a literature search enabled me to understand that it was rather prototypical. Researchers' extreme emotions tend to be discussed mostly off the record as personal anecdotes, since they are seen as "noise" rather than methodologically relevant data points that are valuable enough to take center-stage in the scientific discourse. Here the scientific literature fails to integrate the macro-level research of grand societal challenges in extreme contexts with the micro-perspective of researchers' emotions. The impact of emotions on sensemaking activities, and subsequently theory building, remains insufficiently understood.

In this essay, I endeavor to show that emotions must not be discarded as "noise" but should be leveraged as a powerful tool for sensemaking and theory building. For this, I will elaborate on two interconnected topics. My first focus (4.2) will be the strong presence of emotions in the context of grand societal challenges and extreme context research. I will illustrate their impact on theory building and the underrated role of reflexivity in management and organization studies. My second focus (4.3) will be a documentation of how, from my research in refugee camps on Lesbos, I leveraged emotions for theory building, translating them into a metaphor to describe the complex and seemingly paradoxical situation on Lesbos as well as situations that are prototypically similar. I will then introduce the resulting theory (4.4): the "settled emergency" metaphor, a synthesis of the strong presence of

emotions in extreme context research and structured reflexivity that strives to leverage these emotions for theory building. Furthermore, metaphors play a very important role in the theory-building process itself, as they provide a vocabulary to communicate the different stages of understanding a complex phenomenon in an accessible way (Cornelissen, 2006a; Weick, 1989). Metaphors are of particular significance in the context of utilizing emotions in theorizing, as emotions are triggered by concrete images that can provide emotional understanding. Therefore, I will end with elaborating on the abductive leaps (4.5) in my theory building that led to different metaphors – and how this process was mediated by my emotions.

4.2 Emotions in the context of grand societal challenges and extreme context research

4.2.1 Emotions and theory building

For a long time, emotions have only been discussed implicitly in organizational theory rather than being directly theorized upon. However, emotions are essential to social systems, as they decisively shape perceptions and actions. Thus, they should also be pivotal in organizational theory (Goodwin & Pfaff, 2001; Voronov & Vince, 2012; Zietsma et al., 2019). This has been increasingly acknowledged in recent years, and emotions have sparked a lot of interest in organizational theory (Creed et al., 2014; Friedland, 2018; Maitlis, Vogus, & Lawrence, 2013). These studies typically approach emotions from a strategic perspective (Zietsma et al., 2019), showing how they are of crucial importance in institutional formation, maintenance, and change processes (Creed, DeJordy, & Lok, 2010; Friedland, 2018; Gill & Burrow, 2018).

Emotions have also been conceptualized as discursive constructs that can be used to handle resistance and gain support for institutional aims (Moisander, Hirsto, & Fahy, 2016). A core feature of emotions is considered to be their motivating effect in institutional work (Friedland, 2012; Voronov & Vince, 2012); furthermore, emotions can be provoked by experiencing threats to the values of the institution people are affiliated with (Lok & De Rond, 2013; Wright, Zammuto, & Liesch, 2017). Reviewing emotions in sensemaking literature, Maitlis and colleagues

(2013) identified the role of emotions as being a crucial part of the sensemaking process on an individual and collective level (Creed et al., 2014; Cornelissen, Mantere, & Vaara, 2014; De Rond & Lok, 2016; Maitlis et al., 2013; Sandberg & Tsoukas, 2015), which ultimately affects behavior (Maitlis & Christianson, 2014; Rafaeli & Vilnai-Yavetz, 2004). Emotions are thus of vital importance for the construction of personal sense-giving narratives (Creed & Scully, 2000; Gutierrez, Howard-Grenville, & Scully, 2010) and central to logic construction (Fan & Zietsma, 2017).

When “emotion signals the need for and provides the energy that fuels sensemaking” (Maitlis et al., 2013, p. 222), researchers’ emotions must also have an influence on how they make sense of their data. For a long time, this was a hard-to-defend position in management and organization studies as it opposes the paradigm of the pure rationalism of scholarship and the identity of an emotionally detached scientist. Born of a positivistic paradigm, emotions are imputed to cloud the perception of reality, ultimately making it more difficult to reach ontological consensus. So, researchers are traditionally encouraged to subtract their emotions from their sensemaking process (Kleinman & Copp, 1993).

From a constructivist standpoint, these assumptions do not hold up to scrutiny, since researchers are also driven by emotion, cognition, and frames from previous experiences. This paradox is fittingly described by Kleinman and Copp (1993): “Qualitative researchers hear mixed messages. On one hand, they are told that their emotions can hinder good research. On the other, they are told that they will not understand participants unless they form attachments to them. Consequently, most of us act like quasi-positivists: We allow ourselves to have *particular* feelings, such as closeness with participants, and try to deny or get rid of emotions we deem inappropriate” (p. 2). Thus, participant observation by its very nature requires the researcher to oscillate between the role of the observer and the participant. This results in the need to select which emotions are to be allowed and which should be denied, and carries the danger of skewing the results of the underlying research. Management and organization researchers are often located in business schools with traditions of pushing emotions aside to maintain a “professional” demeanor in action. Ruebottom and Auster (2018) reconceptualize the researcher as a more realistic human being by advocating acceptance that emotions are embedded in

researchers' cognitions and should be an integral part of scientific reflexive processes. Whiteman (2010) argues for using strong feelings as analytical clues to both improve researchers' understanding of phenomena in management studies, and direct future research. She posits that heartbreak, in particular, serves as an indicator of whether we have dug deep enough in our data, arguing that without heartbreak "our scientific accounts may be less rich and potentially misleading" and that, furthermore, strong emotions on a topic reveal political beliefs, which can help researchers to "reveal our hidden assumptions" (Whiteman, 2010, p. 335), a concept further developed by Hage (2009) through conceptualizing "political emotions." Although these issues were raised as early as 2010, ten years later there is still very little published in most high-ranking management and organization studies journals about researchers' emotional processes during research. Gray (2019) reported how her own endeavors to produce reflective accounts through questioning her identity and epistemological underpinnings were even actively discouraged by editors.

Meanwhile, another interesting development in management and organization studies is taking place: there is an increased appeal to conduct research in extreme contexts, such as risky, emergency, or disrupted contexts (Hällgren et al., 2018). Hällgren and colleagues (2018) argue that extreme context research provides a "unique platform for the study of hard-to-get-at organizational phenomena [...] [showcasing] the best and worst of human and organizational behaviors and accelerates processes otherwise impeded by bureaucracy, power plays, and politicking" (p. 112). These extreme and often unsafe contexts are predestined to trigger strong emotions in researchers. This applies to the fieldwork itself and to other phases of the research encounter such as intense data analysis processes.

In the context of ethnographies, the explicit consideration of emotions has a long tradition. Here, a discussion on emotional agitation during and around fieldwork has already taken place (see e.g. Behar, 2014; Hage, 2009; Irwin, 2006). Kleinman and Copp (1993) take a sociological perspective on researchers' emotions, but mostly *during* fieldwork. Furthermore, Alvesson, Hardy and Harley (2008) and, building on that, Gray (2019) have created guidelines for reflexivity in management and organization studies, and, even though these practices surely provoke emotions, the literature stays surprisingly silent on "whether and how" to systematically reflect on researchers' emotions and their use in theory building.

4.2.2 How emotions can bolster reflexivity in management and organization studies

When talking about engaging with one's own emotions, we enter the thematic field of reflexivity. Reflexivity is widely discussed in qualitative research, as it is considered to be a key method of quality control (Alvesson et al., 2008; Berger, 2015; Gray, 2019). "Reflexivity is commonly viewed as the process of a continual internal dialogue and critical self-evaluation of researcher's positionality as well as active acknowledgement and explicit recognition that this position may affect the research process and outcome" (Berger, 2015, p. 220). Furthermore, "fundamental to the reflexive stance is the premise that researchers can never apprehend objective reality, gaining instead only an interpretation shaped by the researcher's pre-existing frames of reference" (Gray, 2019, p. 239). So "all knowledge projects are thus 'dangerous', insofar as any version of truth carries with it a particular freezing of the social world and a configuration of political privileges and should, therefore, be closely interrogated and cross-examined" (Alvesson et al., 2008, p. 485).

From a constructivist standpoint, it is assumed that even the most proficient observer is unable to give a completely objective and unbiased testimony of the constitution of the social world. Reflexive approaches acknowledge these limitations and aspire to reduce bias. Alvesson and colleagues (2008) advocate that reflexivity is a textual practice in a certain research community, e.g. in management and organization studies, and argued that the term reflexivity is in itself misleading as it is too undifferentiated since various practices are exercised. They (Alvesson et al., 2008) speak of "reflexivities," referring to four practices that are the result of a critical synthesis of existing literature. Two of the categorized practices, "multi-perspective" and "multi-voicing," focus on alternate points of view and the creation of new knowledge. The other two, "destabilizing" and "positioning," are related to the deconstruction of positive claims (Alvesson et al., 2008). Gray (2019) adds another two practices: "reflecting on one's own proclivities and biases" and "reflecting on one's choice of a research topic." These mainly address the foundations of epistemological assumptions, but ultimately affect all parts of the research process (Gray, 2019).

4.3 Using reflexive practices to leverage emotions

In my own research, I relied on each of the above six reflexive steps (multi-perspective, multi-voicing, positioning, destabilizing, proclivities and biases, choice of research topic) and subsequently introduced a seventh (“engagement with one’s own emotions”), which I advocate adding for a more complete reflexivity in the research process. To illustrate the practical effects of this, I summarize my emotional situation in the context I was investigating (4.3.1) and elaborate on how each of the reflexive practices (4.3.2) was leveraged to use them in theory building.

4.3.1 Example situation: Forced displacement on Lesbos, a local manifestation of a global grand challenge

The concept of grand challenges provides a global perspective on complex societal developments. These cannot be observed from an abstract, large-scale perspective only. The study of grand challenges relies heavily on first person accounts and fieldwork. Grand challenges affect large parts of the global population, beyond the boundaries of organizations and communities (Eisenhardt, Graebner, & Sonenshein, 2016; Ferraro, Etzion, & Gehman, 2015; George, Howard-Grenville, Joshi, & Tihanyi, 2016). They are “highly significant yet potentially solvable problems” that are “typically complex with unknown solutions and intertwined technical and social elements [...] [presenting] extensive theoretical opportunities to reveal new concepts, relationships and logics of organizing” (Eisenhardt et al., 2016, p. 1113).

In 2015, the Greek island of Lesbos was confronted with a local manifestation of the grand societal challenge of forced displacement. Over 500,000 arriving refugees marked the onset of the so-called European refugee crisis. In the first few months of the extensive refugee movements of 2015, a myriad of stakeholders organized their own response in an ad hoc manner due to the absence of a formal response by EU and Greek government authorities. In March 2016, the EU–Turkey statement changed the game by blocking this migration route into Europe (Hirt, 2017). As a result, the number of boat arrivals dropped. Nevertheless, the refugee numbers on Lesbos constantly exceed the available housing and processing capacity, and the majority of refugees do not have appropriate accommodation, sanitation, psychosocial support, education, or other critical services.

Research has addressed how to find solutions to grand challenges (Battilana & Dorado, 2010; Dorado, 2013; Mair, Martí, & Ventresca, 2012), including the context of forced displacement with individual institutional approaches to refugee crisis management (for example Crisp, 2000; De la Chaux, Haugh, & Greenwood, 2018; Milner & Loescher, 2011). Scholars have studied how one specific site or organization provides a particular service or performs a particular task (e.g. De la Chaux et al., 2018; Kornberger, Leixnering, Meyer, & Höllerer, 2018). But refugee camps are often open institutions where the refugee population is able to move in and out and engage with organizations and individuals outside the camp site. In the study of the refugee situation on Lesbos, the boundaries of study were therefore expanded beyond the camp borders to investigate diverse stakeholders and phenomena on the island.

Throughout the crisis, the organizations and individuals involved in the response to arriving refugees gained expertise and influence. Even three years later, a complex blend of local, national, European, and global organizations remained present and active in the response on Lesbos. In 2015 and 2016, more than 110 non-governmental organizations³ (NGOs) were present; in 2017 and 2018 over 60 NGOs⁴ were active. In addition to NGOs and government organizations (GOs), transnational security organizations (TSOs) are also responsible and active in the setting.

The initial reception of refugees on Lesbos is conducted in camp Moria. Moria was originally designed for the short-term accommodation of refugees, who were intended to pass through within six weeks. However, refugees have often had to endure living in the camp for over a year while waiting for their asylum claims to be processed. Waiting under precarious conditions, in a fatally overcrowded camp, has caused the inhabitants' health, especially their mental health, to deteriorate quickly, frequently resulting in pathological depression (Fotaki, 2019; Médecins sans Frontières [MSF] 2017; Pascucci & Patchett, 2018). Professional aid workers in the setting compare the situation to their prior experiences in war zones or missions in DR Congo, stating that what they see on Lesbos is in fact worse (Fontana, 2018; Tondo, 2018). Over the years, the local population has repeatedly

³ Based on information provided by the municipality of Lesbos.

⁴ Based on author's own count and listing.

expressed their despair over the way European directives (EU–Turkey statement, The Hotspot Approach, Dublin III) have been put into effect, lamenting that their home has been transformed into an Australian-style prison island. They report on the emotional trauma this entails for both the refugees and themselves. However, locals make the effort to clarify that their criticism is not targeted at arriving refugees but at how the situation is managed. “They turned our islands into prisons, into places of isolation with camps crammed with thousands of people, many, many more than they can handle, living in terrible conditions and becoming a bomb that may go off at any time,” says a hotel owner in Molyvos (Danou, 2017). He is expressing his frustration and fear regarding the lack of safety for locals and refugees alike, leading to the common understanding of many stakeholders that it is not a refugee crisis but a response crisis. This state of “stable instability” has remained unchanged for years, triggering strong emotions both in the people who have to deal with it (Chapter 3) and also in me, the researcher.

4.3.2 Applying reflexivity

4.3.2.1 Using reflexivity: multi-perspective practices

Reflexivity as a multi-perspective practice entails juxtaposing multiple perspectives to “use tensions among different perspectives to expose different assumptions and open up new ways of thinking” (Alvesson et. al, 2008, p. 483). It is, then, “the *accumulation* of these perspectives that amounts to reflexivity: the use of different perspectives is enlightening in that it helps to complement otherwise ‘incomplete’ research [...] to answer the question: what are the different ways in which a phenomenon can be understood and how do they produce different knowledge(s)?” (Alvesson et. al, 2008, p. 483).

I carried out this practice by immersing myself deeply in each stakeholder perspective and moving from place to place in the field and from position to position in theory. Part of this was the attempt to dismantle the conspiracy theories held by various stakeholders. I took the perspective of all stakeholders and followed their allegations, investigating which accusations could be proven and which could not, and I observed my emotions during that process so as not to be misled by strong emotional reactions that might be aroused by a groundless conspiracy theory.

4.3.2.2 Using reflexivity: multi-voicing practices

Reflexivity as a multi-voicing practice acknowledges that the researcher is a part of the research project and that she creates an image of herself as a researcher in the field. She also establishes herself as being competent to attest that the resulting work is significant (Alvesson et al., 2008; Hardy, Phillips, & Clegg, 2001). This touches upon how research subjects are represented in a study (Gray, 2019) and “forces the researcher to ask questions about the relationship between the author and the other and to consider whether, and how, the researcher can speak authentically of the research subject” (Alvesson et al., 2008, p. 488).

Applying this to my own research as a management scholar, the focus of my study was on the system of stakeholders in the refugee setting. For my study, I defined very clearly whether I would really need to talk to refugees. I considered it unethical to interview refugees and feared that some could feel obligated to participate, hoping it would benefit their asylum application. Furthermore, I was concerned about causing harm to people with traumatic experiences. In order to get the necessary contextual information that could only come from the refugee’s perspective, I conducted only one interview with a refugee who had been in the setting for years and represented his community in one of the camps. Otherwise I talked less formally with refugees during participant observation to get their perspective on the situation.

4.3.2.3 Using reflexivity: positioning practices

Alvesson and colleagues’ (2008) third set of practices draws on the concept that knowledge is created in the exchanges between people, and that research and knowledge are created in and for a certain research community, which influences the knowledge production itself (Gray, 2019). In this regard, reflexivity should scrutinize how the particular research community affects and limits sensemaking and how, in the end, one way of sensemaking prevails. It is therefore important to “identify conventions, fashions, and conformist pressures” (Alvesson et al., 2008, p. 489) embedded in the science arena in general and the research community specifically. Hardy and colleagues (2001) argue that “as a result, the research ‘products’ – published papers – bear only a limited resemblance to our original intentions” (p. 544), giving the example of their work which was initially interested

in discussing refugee rights and empowerment but which, after “translation” through the research community, turned into a “product” on collaboration, identity, and ultimately reflexivity.

Reflecting on the starting point of my own research (organizational identity) and reading about the experiences of Hardy and colleagues (2001), I can see a strong resemblance to this essay. Hardy and colleagues (2001) say “While we have a degree of agency, the networks in which we are embedded help shape our translation” (Hardy et al., 2001, p. 544). I wonder how big that degree of agency actually is and whether “help shape our translation” may perhaps be a euphemism for “determine our thought system.”

Nevertheless, this practice of reflexivity implies that the researcher works around constraints if she cannot dismantle them. My approach was to address several research communities (e.g. management, organization studies, psychology, grand societal challenges, methodological considerations) and gain freedom by moving between research communities.

4.3.2.4 Using reflexivity: destabilizing practices

Reflexivity as a destabilizing practice targets the scientific community and how the “production of knowledge, particularly positivist versions that try to establish ‘the truth’, lead to a certain version of the social world, with associated power effects” (Alvesson et al., 2008, p. 485). Choosing certain concepts above others in theory building might perpetuate a reality that is beneficial, indirectly or directly, to the creator of the theory. In the end, this practice aims to deconstruct and, unlike practices mentioned earlier, does not help to create new knowledge. At this point, I leave it to others to scrutinize my work.

Nevertheless, I would like to share an account of how my sensemaking was destabilized by encounters I had when I returned from the field. One challenge was being exposed to media reports that depicted the situation in a way that was diametrically opposed to how I had experienced it in the field. My perception of this disconnect was that the topic of migration was being presented in an objectively misleading way. Even worse, these representations were the grounds upon which discussions took place back home. In my perception, it was as if people were adopting simplified views that could not be swayed, not even by first-hand accounts.

Interlocutors often fell into the role of the outraged. Only later did I find out that this indignation might have been a symptom of the zeitgeist: the 2019 Global Risk Report (World Economic Forum [WEF], 2019) found that the topic of migration sparked political disruption, with a massive upsurge in mutual hatred and anger, commonly referenced as the defining emotion of our time (Mishra, 2017), while at the same time human rights were becoming increasingly politicized (WEF, 2019). Over time, I developed more tolerance, meaning I was more in control of my emotional state regarding views I perceived as simplified. I accepted the difficulty that the complexity of the issue poses for everyone, as well as the limited information everyone – including me – has on the issue.

Born out of the fact that the researcher herself can only exercise a destabilizing practice in an insufficient way, Gray developed two further reflection practices that researchers can implement for themselves by reflecting on their own proclivities and biases and their own epistemological and ontological underpinnings (Gray, 2019).

4.3.2.5 Expanding reflexivity: reflecting on one's own proclivities and biases

“This approach urges researchers to reveal their own identities and to investigate how their identity shapes the research process and their findings” (Gray, 2019, p. 240) and reveals the researcher's intellectual heritage. It also connects to Van Maanen's (2011) seminal stance that the representation of others' social realities is always conducted from the starting point of one's own. This is the basis of Claus, De Rond, Howard-Grenville and Lodge (2018), who argue that a high contrast between the previous personal life and the lived experience in the field is what triggers strong emotions.

My previous life included working and studying on a Mediterranean island, and I had experienced that island life can be depressing and, at times, even feel like a sort of prison. Extensive backpacking travels, mostly on budget routes around the world, had brought me in contact with people who live in very basic accommodation with rudimentary sanitation. Therefore, the stark contrast on Lesbos between the severe refugee situation in the Moria hotspot and the beautiful holiday island around it was not as extreme for me as it might have been for a researcher who had been socialized strictly in the first world.

As already noted by others (Creed & Scully, 2000), I experienced that my professional background and institutional affiliation had an impact on informants. One gatekeeper told me: “I would not let you in were you not from a big university,” thereby touching upon another socio-cultural aspect of the research context – the high power-distance and extremely high uncertainty-avoidance (Hofstede, 2011) in Greek national culture created additional obstacles for a junior female researcher. In my field notes, I often remarked about how much gender mattered in the setting, which affected the research endeavor as it opened some doors and closed others.

I approached my analysis of the highly fluctuating institutional context through an organizational lens, which resulted in designing a stakeholder map to create some order, and therefore more “felt security” for me. The clustering of stakeholders by their organizational form, resulted in eleven supergroups: 1. locals; 2. refugees; 3. municipality; 4. Greek state actors/government organizations (GOs); 5. European Union (EU)/transnational security organizations (TSOs); 6. international organizations; 7. NGOs; 8. independent volunteers; 9. activists/anarchists; 10. researchers; and 11. media. During the subsequent transcription and coding of my data, I methodically dove into these different stakeholders’ perspectives and found something that seemed to be more important than organizational identity in the setting, i.e. the role identity of actors (Chapter 3). However, at the beginning I looked at the case through the lens of organizational identity.

4.3.2.6 Expanding reflexivity: the impact of choosing a research topic

Gray (2019) encouraged the researcher to question why they have chosen a certain research topic, giving rise to the thought that research “on the ‘dark side’ of organizations may fall into the category of research that is considered taboo because it exposes unethical and undesirable consequences of organizations” (p. 241). Gray (2019) also argues specifically for investigating power distribution: “As important as questioning our theorizing is interrogating ourselves about our own complicity in failing to explore these and other questions about how power serves the rich and punishes the less fortunate. In that regard, reflexivity about not studying social class also illustrates the first category of reflexivity (in identifying one’s biases)” (p. 243). At the beginning of my fieldwork, I focused on organizational identity (aiming to continue my stream of thought from Chapter 2) as my research topic. However,

after a short time in the field, my emotions were aroused by what I perceived to be more salient: injustice towards refugees arriving and locals living on Lesbos and the continuation of this situation for years. My compassion was further triggered by seeing people on the ground investing themselves in improving circumstances while factors beyond their control made it impossible for them to make progress. As the system in place was not officially implemented through a democratic process, there were no democratic channels to tackle its weaknesses – and this aroused feelings of anger and helplessness. This led me to focus on the system of unofficial power distribution and its effects on the various stakeholder groups (Chapter 3).

4.3.2.7 Developing reflexivity: reflecting researchers' emotions

Even if it is not a linear or proportional dependency relation, we can assume that the more reflexive practices are applied, the more objective the results become. I would therefore argue that Alvesson and colleagues' (2008) and Gray's (2019) reflexive practices should be grouped into a methodological workflow and would add one further reflexive practice: emotional reflexivity.

Researchers can challenge the validity of the construction of their own theory by asking themselves: "Which emotions am I experiencing?" "Which emotions am I not experiencing?" "Who says or does what to trigger these feelings?" "Do emotions change across situations or time? And why?" On a more topical level, these can turn into: "Why do I make sense the way I do?" "Could the opposite also be true?" "Would I accept the opposite?" It is essential to follow the resulting leads in a disciplined way. However, the questioning of emotions should also be applied during peer discussions, in which counter-checking peers are able to be more rigid. In this way, we can work with our emotions and even leverage them for more valid theory building.

I perceived emotional discomfort during the entire period of my fieldwork on Lesbos, but I did not engage deeply with these feelings while I was in the field. They reappeared later, long after I had returned and was reviewing my recordings and data. In the field, I was busy "just functioning" and did not give myself enough time to digest intense experiences. Limited time and money for my research pressured me to make the most of the time in the field. In retrospect, this resulted in me conducting too many interviews each day. Another reason why I dulled my

emotions was that I found the situation already highly emotionally loaded because of the intense feelings about the injustices felt by the people I met. Conversations were highly emotional, and it took a lot of effort for me to lead them in a productive manner. The overall feeling was that the situation could explode at any time. By dulling my own emotional reactions in the field, I was attempting to remove them from an equation that was already full of others' emotional "noise."

Nevertheless, the majority of my work conducting this case study consisted of desk work rather than fieldwork, and so I delayed paying an emotional toll until the post-fieldwork period with its long and draining analysis. Strong emotions surfaced back at home, and it was not easy to acknowledge and cope with them. So, what were the triggers for these delayed emotions? Apart from the accumulated emotional processing that was needed, it was mostly the deep dive into the data that triggered a strong emotional response: listening to recordings, transcribing, reading and coding the data. Coding and recoding the data repeatedly exposed me to the terrible stories of the refugees and to others' secondary trauma. I felt anger and annoyance because of this man-made humanitarian crisis. While aware of the research community's reservations about emotions in research, I asked myself: How relevant can an analysis of such emotionally loaded contexts be if these emotions, including mine, are not examined methodically?

As there is no unbiased work, and reflexivity only serves to increase the validity of research, conscious engagement with one's own emotions is needed to help control bias. Suppressing all feelings in a challenging research process would simply skew the results, and just listing the limitations of our studies is not the same as reflexivity (Gray, 2019). What makes reflexivity on one's own emotions highly useful is that it is not only directed backwards towards validation but also forwards towards knowledge construction. In this way, we can work with emotions and even leverage our emotions for theory building. This is the process I conduct in the next section, where I describe how the examination of my emotions led abductively to theory building about the setting and resulted in the development of an apt metaphor (Cornelissen 2005, 2006a) to describe it.

4.4 Leveraging emotions for theory building:

How a “settled emergency” metaphor is born in an unsettling context

“We have to understand that the agenda of the actors is the most important thing. Refugees themselves acknowledge this. The least we can do is acknowledge this ourselves. [...] There is no such thing as one strategy being put forward. You have different actors with different strategies and this whole thing becomes a monumental fuckup! Monumental!” (Lesbos 2018, Local)

The strongest emotion within me was anger. Was I just tuning into the dominant feeling of our time? What in particular triggered my tremendous anger? It was the systematic perpetuation of suffering on European ground that was emotionally unsettling in my own sensemaking as my base assumptions on European values were under attack. People looking for safety were forced to live in conditions that compromise European values on European soil. The contradiction between my experiences and beliefs was very unsettling. This perceived double morality fueled my anger. It was not the action of one stakeholder group in particular that aroused this emotion, but rather what appeared to be a non-accidental system which was causing avoidable suffering. During the analysis process, something that had surprised me in the field evolved into a full-blown paradox: a system of stakeholders, a set of groups and teams that were trying to end an ongoing emergency, and therefore should be intrinsically dynamic, was, in fact, static.

“We are moving into the third year now, and little has changed. [...] It is confusing to me how nothing can change. How so much can change and how so little can change.” (Long-term Volunteer)

“This thing can create dead people on the sea. So, there is this insane cynicism on the part of the EU, when it comes to dealing with this. I could never imagine. I know that kind of people are rather cynical when it comes to kind of you know policy making but this is extreme. And also, it doesn't work. [...] I mean the idea is that we will keep these people on a limbo state. [...] The rate at which we're looking at the applications for asylum is ridiculously slow. Ridiculously slow! And the whole thing is meant to do one thing, prevent people from trying to enter. Now it is also schizophrenic. So, we prevent people from wanting to enter. But on the other hand, just last week, you bomb Syria.” (Local)

Early in my analysis, the permanence of the situation was only one of many components of the case study. But as my immersion into the various stakeholder perspectives progressed, it became apparent that everything seemed to revolve around a paradoxical inertia. Almost all the stakeholders had settled into an attitude of “we cannot do anything fundamental here because the other stakeholders are blocking it.” The result was a highly stable circle of blame that became the central justification for an overarching inertia. This excuse for why the stakeholders could not do what was needed to end the emergency produced its own disaster: refugees on European soil are living in such dire conditions that their health, especially their mental health, is severely harmed. Harm is not limited to this stakeholder group but extends to the others e.g. in the form of secondary trauma. And while many of the stakeholders in the setting are there by their own choice, locals and refugees are not. My anger about the inertness of the situation triggered a need to build a theory about it. There are a number of reasons for the inertness in the response to arriving refugees on Lesbos. Stakeholders are operating in an arena of competition where they blame each other in a “circle of blame” and where some profiteer from the status quo. This creates fear of punishment if the fundamentals of the situation were to be tackled. In Lesbos, no capacity building is taking place and there is a high turnover of staff who suffer from episodic boredom. These reasons are illustrated by the interview quotes in table 4.1.

Table 4.1 Characteristics of a settled emergency

Charac- teristics	Data excerpts
Circle of blame	<p><i>“You stop the war, and you finish this. You see the Syria 10 years before? It was like a European. It was beautiful! And now it is all dead. As it started, you can finish it. But I think, they don’t want to finish it. It’s behind I believe there are a lot of things. And the American, and the Europeans, and the Israel, everybody, and the Turkish. And all this money the Turkish take from all these people who come here in Lesbos.” (Local)</i></p> <p><i>“It is a money-making business. Do we really think that the government is not part of the smuggling ring that is happening? I am sorry, they cannot really control their border and not let anybody cross? [...] There is technologies, there is coast guards, there is navy, there is everything. So if they want to control it, they will not let even a fly cross. The whole issue with the refugees is politicized. That’s it. They are used and abused for political reasons. That’s what. And the politics as we know, it’s controlled by economy, by gas in the Mediterranean, maybe? By differences between the Mediterranean countries, and Egypt does not talk to Turkey, Turkey does not talk to Israel, Greece is friends with Israel, Cyprus is... So, there is a larger interest than a few thousands of refugees. They mean absolutely nothing.” (Professional Aid Worker)</i></p> <p><i>“You know, and, and, and, and eh, maybe our anger turned more to these organizations than it should have. But it was like a hostile takeover. Simple as that.” (Local)</i></p> <p><i>“Let’s do it for the best for the good of this people. Not for me. I don’t build my CV or my profile over here. I don’t need that. I care for these people.” (Municipality Employee)</i></p>
Profit- eering	<p><i>“I am here also for personal reasons. One of them is, to improve myself, my career, and to improve myself as a person as well.” (Volunteer)</i></p> <p><i>“A1: For me it is some kind of rest. Because when I am at home doing nothing I get restless, and I think there is so much to be done. You know, and I see everything, and yeah of course I get something out of it too. But I think a lot of people also have personal problems and come here to... A2: ...therapy [...] or believers. In the NGOs are a lot of believers, to bring on the Lord. Or what they bring.” (Independent Volunteers)</i></p>

	<p><i>"I think the grassroots organizations and the independent volunteers also have a more political idea. It is not only helping, 'Oh, I want to help the poor refugees', or things like that, but also because you have a political view of the world." (Independent Volunteer)</i></p> <p><i>"This is one of the things that I find most bizarre, or most perplexing about organizations in humanitarian aid, is that, in actual fact none of us are interested in it ending [...] From an organization point of view that is not good, because [...] we need to find more crises where people are dying to some extent." (Volunteer)</i></p> <p><i>"What signal would it be if one were to come here and after three days has gone through the asylum process and would then be able to travel onwards immediately?" (Professional TSO Employee)</i></p>
Fear	<p><i>"Why you ask me something that you know that will maybe matter for me?" (Municipality Employee)</i></p> <p><i>"NGOs are afraid for their bad name." (Professional Aid Worker)</i></p>
No capacity building	<p><i>"Everybody is holding on to a failed system of you know, hotspots, camps. This whole thing is not going to work, one way or another. And they're afraid of doing anything that will make the situation better. Because if it makes the situation better, immediately that undermines the entire rationale behind the migration policy which is: make the situation slightly more of a living hell. So we'll stop them from migrating. So we cannot make it better, because then they will come. It is a really moronic idea at best and it's cruel." (Local)</i></p>
Staff turn-over	<p><i>"I thought: 'I can manage the three weeks between sports and spring break.' [...] Three weeks is nothing here. As a short-term volunteer you are not even taken seriously here. People don't see you at all. But how shall bonds develop when volunteers all disappear again? Also the conversations are so superficial. It reminds me a lot of a backpacking community here. And there are also so many women here who want to help." (Short-term Volunteer)</i></p>
Boredom	<p><i>"And it's even sometimes like today, when there's no work, sometimes they argue about who can still come to work because everyone wants to." (Professional TSO employee)</i></p>

4.4.1 Property: Circle of blame

The circle of blame triggered huge frustration within me: anger because the situation is man-made, sadness because of the suffering of large groups of individuals, and the guilt of a proud European. These emotions triggered theory building about the interdependencies of the situation. I identified conspiracy theories in order to be able to dissect them later. In this regard, Hardy and colleagues (2001) found that the various stakeholder groups in refugee systems have different and often conflicting interests resulting in discursive activities linked to these different interests. Their studies specifically showed “how the concept of a ‘refugee’ is discursively constituted as individual organizations struggle to establish a particular understanding of a ‘refugee’ conducive to their goals and interests” (Hardy et al., 2001, p. 541). “These discursive struggles do not only occur at the organizational level [...] strategies used by the government to promote the concept of sovereignty could draw on immigration discourses that portrayed refugees as frauds. Strategies used by NGOs to advance human rights and paternalism could draw on discursive depictions of the government as incompetent, corrupt and cruel, and portraits of the immigration system as too slow, too tough and inconsistent.” (Hardy et al., 2001, pp. 542). Exercising reflexive practices leads me to understand that no single stakeholder group is to blame, but that there are dynamics at play that are similar to the phenomenon of corporate social irresponsibility (Whiteman & Cooper, 2016), but, in the case of Lesbos, with governments and international communities as part of the stakeholder conglomerate.

4.4.2 Property: Profiteering

Not all circumstances are disadvantageous to all those in the setting. In fact, there are rewards for some and mitigating the emergency would diminish these rewards. Hardy and colleagues (2001) demonstrated that power and politics form an integral part of the social construction of refugee systems and revealed that “government is in the ‘business’ of determination, which is enhanced by juxtaposing deserving refugees against ‘economic migrants’; the latter to be unmasked by the determination system. NGOs that speak and advocate on behalf of refugees are in the ‘business’ of service provision, which is enhanced by refugees as needy ‘clients’ to whom professionals can dispense services. Refugee community organizations are

in the ‘business’ of self-help, which is enhanced by refugees as fully functioning and equal ‘members’ of society (Hardy and Phillips 1997: 11)” (2001, p. 542).

Also, the fact that the management of the response to arriving refugees on Lesbos is in an “emergency mode” of operating serves multiple purposes, e.g. signaling to refugees: “Do not come this way! It is hell” (MSF, 2017). Using EU funds for temporary solutions, like the housing of refugees “transitionally” in hotels, instead of investing money in capacity building could also be seen as a boost to the local economy (Howden & Fotiadis, 2017). The continuation of the emergency provides NGOs with a *raison d’être*, and for some it is fertile ground for their business model. For individuals, it might serve to help them build their CV, develop new skills, live out their religious or political convictions, or take them on a trip of self-discovery (Germann Molz, 2017).

4.4.3 Property: Fear

Fear takes on many shapes such as self-censorship. Stakeholders in the setting carefully choose their words. An inter-agency consultation meeting I attended with approximately 30 people from different organizations of various levels, including government actors and international organizations, only lasted for 12 minutes. No critical questions were asked. This was driven by the subtle fear of punishment or exclusion from the situation. People feared that their organization would throw them out if they said something that put the organization in a bad light. There was also the fear that a partner stakeholder would withdraw from cooperation, or just the plain fear of legal prosecution.

4.4.4 Property: No capacity building

The European hotspot of Moria was designed to house 3,000 people. While some refugees have been stuck for years, new refugees keep arriving. In the four years after 2015, Moria constantly housed between two and four times its capacity. Despite this, its capacity is not being increased. Many refugees have physical pain, insomnia, or feelings of oppression due to depression and stress. While conducting participant observation in the Moria camp, I was asked to help divide a one-family tent, which was already housing a family of five, by creating improvised separators

using rope and linen, in order to house two additional families. This is not a rare occurrence.

4.4.5 Property: Staff turnover

Both the people in charge and their staff rotate out frequently. Aid workers live from mission to mission, and TSOs and security and border personnel change in regular rotation. Project coordinators often change every six months and volunteers often only stay for two weeks, so when I entered the field for a second time – only five months after my initial stay – there were many new faces in the positions I had previously had contact with. Ironically, NGOs, TSOs, and their staff thus appear more transient than the refugees who were originally intended to be “just passing through.” Constant staff turnover results in a continuous knowledge drain which reinforces an emergency mode of operating. As Weick (1988, pp. 312) elaborated: “Institutional memory is an important component of crisis management. People can see only those categories and assumptions that they store in cause maps built up from previous experience. [...] Perception, however, is never free of preconceptions, and when people perceive without institutional memories, they are likely to be influenced [...] by experience gained in settings that are irrelevant to present problems” e.g. other emergency settings. When staffing is volatile, a humanitarian response is deficient.

4.4.6 Property: Boredom

I was surprised to find numerous signs of boredom, with people competing for work or actively seeking to create more to do. Some people came for a three-week spring holiday to volunteer and were associated with an NGO that had no license to operate and were forced into boredom. EU law enforcement agency personnel also reported times of boredom. Frustration and a sense of pointlessness arose within me due to experiencing boredom in an environment where people struggle with their daily lives. As Holt and Cornelissen (2014) suggest, boredom can only exist if we are not occupied with something.

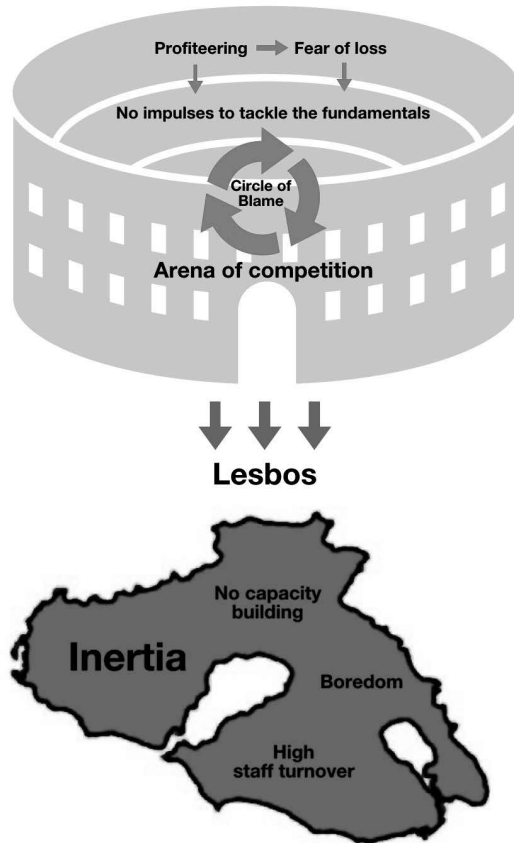
The ongoing, stable circle of blame and the omnipresent self-censorship made it apparent that there is no joint, coherent impulse among the stakeholders to remobilize the situation, to make it dynamic again. This inertness is reinforced by a number of factors. First, the stakeholders are in an arena of competition where they consider themselves to be in opposition to some or all of the other stakeholders, competing either for resources or influence. Second, there is an element of reward in the situation, where individuals feel they can “make a difference” as long as there is suffering to be addressed. Third, there is a (justified or not) fear of exclusion, punishment, or sanctions from the other actors on the ground. There is therefore a need to justify one’s own presence, which results in a focus on small “wins” in each stakeholder’s own little sandbox of specialization. Fundamental new solutions would remove these malfunctions along with the rewards they offer. However, the inertness remains intact. I therefore introduce the metaphor of the “settled emergency” to describe this phenomenon.

The settled emergency is a function of six components: 1. the circle of blame in an arena of competition; 2. profiteering from the status quo; 3. fear of punishment when tackling the fundamentals; 4. no capacity building taking place; 5. high staff turnover; and 6. boredom. Components 1, 2 and 3 are present in other static emergencies in other contexts as well, while components 4, 5 and 6 seem to be more specific to the humanitarian context (figure 4.1).

The theory development process which led to the “settled emergency” metaphor evolved over more than two years, including countless iterations between emotional immersion and rational distancing, often through discussion with peers in a variety of settings (brainstorming sessions, research days, international workshops and conferences).

In the next section, I describe the conceptualization process of the final metaphor of the “settled emergency,” including the leaps that were made, other metaphors that were dismissed along the way, and how this was triggered and mediated by emotions with the aim of obtaining as complete a representation as possible of the phenomenon to be described.

Figure 4.1 “Settled emergency” metaphor with specific characteristics on Lesbos



4.5 Abductive leaping mediated by emotions

According to Weick (1989), theory building can be conducted through “disciplined imagination,” a process in which researchers exercise “thought trials.” Metaphors have a crucial role in thought trials. They are necessary vehicles to communicate the current understanding of a complex phenomenon in an accessible and possibly more abstract manner through images and terms (Cornelissen, 2006a; Weick, 1989) to gain a vocabulary with which to begin. Metaphors are of specific importance in the context of accepting the role of emotions in theorizing, as emotions are triggered by concrete images rather than by abstract models. In the process of understanding emotions, it is therefore important to use images and metaphors that can provide

emotional understanding. It is here that researchers take different leaps in their theorizing, mediated by emotions.

The conceptual leap that leads from qualitative research data to theory building and its creative element is the nucleus of abduction, which Klag and Langley (2013) see as an iterative theory-building process over time, referring to it as “conceptual leaping.” According to Klag and Langley (2013), conceptual leaping oscillates in four dialectic tensions of two extreme poles: “knowing and not knowing,” “deliberation and serendipity,” “engagement and detachment,” and “social connection and self-expression.” These dialectic abduction poles (Klag & Langley, 2013) correspond to dual-thinking modes (Locke, 2007) and include, on the one hand, a liberating influence and, on the other hand, a notion of disciplining the conceptual leaping, the sensemaking, and in the end the evolving theory. Klag and Langley “suggest that the abductive process of conceptual leaping entails bridging across these tensions over time, reaching towards synthesis” (2013, p. 161).

Emotions channel into “emotional abductive leaping” in a sensemaking process. Emotional leaping is primarily anchored in the “engagement and detachment” poles (Klag & Langley, 2013). It oscillates between deep “emotional immersion” in one’s feelings at one end and “rational distance” at the other, an uncoupling which creates emotional indifference e.g. by posing the “So what?” question. Such rational distancing can be exercised with peers and entails researchers not only setting out leaps in their theorizing but also disclosing the emotions involved in their sensemaking process. Emotional leaping involves letting go of emotions, touching upon Weick’s understanding that theory is constructed through “disciplined imagination” (1989).

In mental experiments, theorists “iterate between reviewed literature, preliminary analyses, background assumptions and their own intuition to consider a rich cascade of metaphorical images as representations of the subject or problem in hand (‘imagination’) before selecting and deciding upon one metaphorical image that serves as a starting point for a further inquiry into it (‘discipline’)” (Cornelissen, 2006a, p. 1582). Metaphors are thus used as language to express the understanding of a phenomenon at a certain moment in time in the theory construction process. However, in the process of advancing understanding, early metaphors must clear the way for better metaphors which better represent the phenomena being

investigated. The three key components of such an evolutionary theorizing process are: variation, selection, and retention (Cornelissen, 2006a; Weick, 1989).

To ensure that the metaphor and ultimately the theory that survives this process are the best possible, we must understand how metaphors work and how they are developed and selected. According to Weick (1989) and Cornelissen (2006a), organizational researchers direct their metaphorical imagination process by selecting theoretical representations for the target subject. But to be sure that a metaphor is really the most apt one, theorists must question the selection process by questioning the composition, completion, and elaboration of the metaphor, and by checking it in regards to “eight optimality principles” (Cornelissen, 2004, 2005, 2006a; Fauconnier & Turner, 1998) (see figure 4.2). These “eight optimality principles” embody the constraints under which metaphorical blending processes work most effectively (Cornelissen, 2006a). “The ‘optimality principles’, then, are important within ‘disciplined imagination’ in providing criteria at the level of thought trials for considering whether a metaphorical image is *apt*, that is, fitting and meaningful.” (Cornelissen, 2006a, p. 1591). “Although the optimality principles should not be used to strictly guide and limit the process of metaphorical variation, they can be used within the thought trials to assess the aptness of any one image that is generated” (Cornelissen, 2006a, p. 1591).

4.5.1 Abductive leaps in the context of this research

To attain the metaphor of the “settled emergency” I worked through seven preliminary stages of metaphors in the theorizing process. Due to my preliminary understanding of the situation (the manifestation of the grand challenge of forced displacement) before I entered the field in autumn 2017, I called it (1) a “refugee crisis situation.” However, when I was in the field, I realized that this was a misleading term. During an interview in the field, an interviewee used the metaphor (2) “the shit show,” which conveys the frustration, anger, and cynical mood of those who have been involved for a long time and which serves as the title of this article. However, for a while after I returned from the field, the working title was simply (3) “the mess.” During the analysis process, moving back and forth between deep emotional immersion and rational distancing/uncoupling, the metaphor evolved further to become (4) a “multipurpose mess,” (5) an “institutionalized mess,” (6) a

“settled crisis,” and, finally, (7) a “settled emergency.” In this conscious selection process, the “settled emergency” metaphor “survived” because it was the best fit or, in other words, most meaningful metaphor with regard to the eight optimality principles – as well as a ninth one: emotional space (figure 4.2).

Abductive leaps taken in a theorizing process are triggered and mediated by emotions. Analogous to “thought trails” in “disciplined imagination” (Weick, 1989), we might talk of “feel trails.” The quality of a metaphor is therefore determined by whether it can evoke emotional understanding in others through triggering similar emotions and therewith provide intuitive understanding.

In the following, I describe the conceptualization process and how emotions triggered and mediated the leaps made in the theorizing to develop the most apt metaphor of the “settled emergency.”

4.5.2 Different stages in the development of the metaphor

4.5.2.1 *The “mess” metaphor*

During my first time in the field and at the beginning of my sensemaking, “mess” served as a working title for the local manifestation of the global grand challenge of forced displacement on Lesbos. It was my helpless attempt to describe something I could not at the time verbalize better, as I had not yet identified the categories of the situation, or realized the need to do so. The expression “mess” thus represented my feelings, and triggered the feeling of disorientation in my interlocuters.

However, the term “mess,” which organically emerged, representing my disorientation, frustration, and helplessness at the very beginning of the sensemaking process, lacked concreteness and distance from the target domain. “Mess” was not able to convey enough meaning for those who had not been deeply involved in the context of the case study.

The man-made element of the situation triggered the strongest emotions of frustration, anger, and paradoxically helplessness within me. However, this man-made element is not included in the “mess” metaphor, nor are the intricacies of the various organizations. But it was this notion of “Why is it still a mess?” in particular that I found striking, as a great part of it seemed to have been created by some of the parties who were supposed to be resolving it.

Figure 4.2 Aptness of different metaphor stages by means of optimality principles (based on Cornelissen, 2005, 2006a; Fauconnier & Turner, 1998; Weick 1989)

Problem statement	How can we understand the manifestation of a grand challenge (the specifics of this hyper-complex setting, its nature and processes) in an easy to understand way?
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Thought trial (variation)	Specific manifestation of the grand challenge of forced displacement as
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Metaphors Optimality principles	Mess	Multi-purpose Mess	Institutionalized Mess	Settled Crisis	Settled Emergency
Integration	Satisfied	Satisfied	Satisfied	Satisfied	Satisfied
Topology	Satisfied	Satisfied	Satisfied	Satisfied	Satisfied
Web	Satisfied	Satisfied	Satisfied	Satisfied	Satisfied
Unpacking	Satisfied	Satisfied	Satisfied	(Not fully) Satisfied	(Not fully) Satisfied
Good reason	Satisfied	Satisfied	Satisfied	Satisfied	Satisfied
Metonymic tightening	Satisfied	Satisfied	Satisfied	Satisfied	Satisfied
Distance	(Not fully) Satisfied	(Not fully) Satisfied	(Not fully) Satisfied	(Not fully) Satisfied	(Not fully) Satisfied
Concreteness	(Not fully) Satisfied	(Not fully) Satisfied	(Not fully) Satisfied	Satisfied	Satisfied

Emotional space	(Not fully) Satisfied	(Not fully) Satisfied	Not Satisfied	(Not fully) Satisfied	Satisfied
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Selection criteria 1. That's interesting 2. That's obvious 3. That's connected 4. That's believable 5. That's beautiful 6. That's real (feels right)	Specific manifestation of the grand challenge forced displacement as Settled emergency
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How is it possible that in such a small area in which the whole world seems to be present, people are unable to figure things out? An existential dread emerged. If we are unable to solve this, here, with so many benevolent, intelligent, educated, trained people and so many resources, how will we ever be able to solve any grand challenge of our time?

“Why is it still a mess?” was the broader question when I entered the field for a second time. I worked my way abductively through different ways of theorizing and candid explanations. Could the reason be due to the different national cultures, different organizational identities, unaligned IT systems, different stakeholders, or the complexity of the problem? By sharing my emotions about the situation in peer discussion (with supervisors, in workshops, on research days and at conferences) the metaphor evolved and became more meaningful.

4.5.2.2 The “multi-purpose mess” metaphor

The inertia was surprising when I entered the field for a second time. The situation was a mess and remained one. If we cannot explain the emergence of the inertia, maybe it is constructed? Who benefits from inertness? The surprising answer is a lot of parties. I advanced in my theory building by describing the situation in formal terms, calling this element of the situation “profiteering.” It was this element of the situation that triggered my anger and disgust. These feelings dominated my sensemaking so that at this point it felt right to call it a “multi-purpose mess,” stressing and exposing the “profiteering” aspect of the situation. However, stressing the profiteering aspect of the situation left me feeling guilty again. I felt shame in joining the blame game and felt guilty because I was blaming people who had come to help, investing their private time, energy, and money to make a change that governments were not able to make. Emphasizing the profiteering element of the situation might also affect people I had met in the setting and who I admired for the work they did. Nevertheless, every time I thought about the setting, I felt surprised by the little fundamental change that could be seen – not on the most fundamental level of “Why are there still wars?” but on the level of how things were handled.

4.5.2.3 The “institutionalized mess” metaphor

Advancing the theorizing process, I came to understand that the setting is determined by the organizations and the roles they undertake, and this includes roles which, at times, deviate from their core mandates. Institutions and how they relate to each other influence the setting, and individuals can only act within these boundaries. Here the aspect of “fear” of being excluded from the game and the aspect of “boredom” became more visible.

The feeling of guilt enabled me to elevate my view to a higher level of theorizing, so that the metaphor evolved from that of a “multipurpose mess” to an “institutionalized mess.” What felt particularly right about the “institutionalized mess” metaphor was that it was able to convey the systemic nature of the situation. Nevertheless, I was worried that “institutionalized” in the metaphor would distract organizational researchers by anticipating that institutional theory had been applied in the theory building.

4.5.2.4 The “settled crisis” metaphor

After working with the “institutionalized mess” metaphor for a while, again the feeling of guilt was aroused. It felt wrong to me that the element of human suffering was missing. One could argue that this was encapsulated in “mess,” but this turned out to be untraceable for someone not familiar with the setting. Sharing these feelings of concern with peers led to a deeper understanding by them and to recommendations for further reading that guided the way to an expression of the inertia of the situation in which several organizations remain in an emergency mode of operating for years. So the word “settled” is used in the sense of Swidler’s “settled cultures”: “Although internally diverse and often contradictory, they [settled cultures] provide the ritual traditions that regulate ordinary patterns of authority and cooperation, and they so define common sense that alternative ways of organizing action seem unimaginable, or at least implausible. Settled cultures constrain action over time because of the high costs of cultural retooling to adopt new patterns of action” (Swidler, 1986, p. 284). As in other emergency contexts, the first response to the emergency sets the tone for the rest of the crisis response (Shrivastava, 1987). Weick (1988) even argues that it is unavoidable that people and their response to a crisis become part of the emergency. In the case of Lesbos, this entailed important

parts of the response being provided by NGOs instead of GOs. Nevertheless, I worried that a “settled crisis” metaphor could be misunderstood as a post-crisis situation in which a crisis has been resolved.

4.5.2.5 The “settled emergency” metaphor

Although “our actions are always a little further along than is our understanding of those actions, which means we can intensify crises literally before we know what we are doing” (Weick, 1988, p. 308), more than three years of experience in a relatively consistent situation offers many possibilities for retrospective sensemaking. “The joint beliefs, ‘I have capacity’ and ‘capacity makes a difference’, should reduce defensive perception and allow people to see more. As they see more, there is a greater probability that they will see some place where their intervention can make a difference” (Weick, 1988, p. 311). I found it surprising that the exact opposite seems to be the case within a settled emergency: no long-term plan or solution is put forward and the question of how to deal with the numbers of refugees arriving is an issue that is dealt with from one day to the next. That civil society steps in when the state is not able to respond is something that could be seen in many other parts of Europe in the historic year of 2015. However, after some time, society expects the state to take over (Kornberger et al., 2018). Conversely, this is not the case in the settled emergency on Lesbos.

A crisis, and more so a “settled crisis,” is handled by government actors. However, in the settled emergency of Lesbos, NGOs are still responsible for crucial services like food, sanitation, schooling, and legal support. This is where the aspects of no capacity building and high staff turnover come into play. Residents normally argue that the emergency state ended six months after its onset in 2015. From their perspective, and even more so from a tourist perspective, this is perfectly comprehensible, as one can live and take vacations on the island without seeing refugees or having any contact with the refugee context, as Lesbos is the third largest island in Greece. Thus, the metaphor does not refer to the island as whole, but rather to the response to the refugees on the island. “Settled emergency” reflects the reality of the refugees’ living conditions as perceived when in close proximity to the realities of refugee life on the island. From further away, it might appear to be a well-handled crisis management response. So, refugees and actors in direct

contact live in the context of a permanent emergency, while those actors not in direct contact with the refugees or their living conditions do not really perceive it as such.

My emotions of frustration about the injustice of the system, the observation that individuals struggle on the ground in any organization, the fact that individuals cannot tackle the causes of the situation, and the intractability of organizations that are part of the setting all fostered the “settled emergency” metaphor. Peer discussions also circulated around the emotional relevance of the terms “crisis” and “emergency”: an emergency is more acute than a crisis. It is also the linguistic expression of a “settled emergency,” which better conveys the emotions of the phenomenon it describes. The linguistic antithesis of the combination of “settled” and “emergency” transcends the cynicism that many develop as a coping mechanism of last resort after observing, over a number of years, the overly inert situation with global intricacies and its local human-made manifestation. “Settled,” in the sense used by Swidler, refers to the stakeholders who have “settled” within an emergency rather than in the sense that the emergency is settled. The term “emergency” relates to the living conditions of refugees and those people on the island affected by this reality. It makes me feel calmer as I perceive the “settled emergency” metaphor as less misleading than any other previous metaphor because it points the finger at the man-made human suffering better than any previous stage of the metaphor. The metaphor itself oscillates between the notions of stability and despair.

Starting with the problem question (“How can we understand the nature and evolution of the manifestation of the grand challenge of forced displacement?”), I moved through the theorizing process by crafting different metaphorical images (mess, multi-purpose mess, institutionalized mess, settled crisis, settled emergency). These images are landmarks in my sensemaking and theorizing process. They all produced images, terms, and a more abstract representation of the situation. They all fit to varying degrees, but the quality of a metaphor also improves with each evolutionary step of sensemaking. At this point the “settled emergency” metaphor is more apt than all the previous metaphors, and it fulfills Weick’s (1989: 525-528) selection criteria “that... [it should be] enlightening, simple, connected, believable, aesthetic and real.” It fulfills the “real” criterion, in particular, as it tries

to arouse the same emotions for an intuitive understanding. This also relates to how easily a metaphor can be understood (Cornelissen & Kafourous, 2008). All metaphors generate novel inferences. The two-word metaphors created more conjectures than just the single word “mess.” By evaluating the metaphors using the eight optimality principles and through discussion with peers, the four two-word metaphors, particularly those of the “settled crisis” and the “settled emergency” were found to be particularly apt.

Most importantly, however, the optimality principals did not reveal great differences between the aptness of the metaphors of the “settled crisis” and the “settled emergency”; it was primarily through the mediation of experienced emotions and the need to reflect them in the metaphor itself that the decision about which metaphor to choose could be made. Thus, the aptness of a metaphor increases when it can act as a catapult into the emotional space of the depicted phenomenon.

Applying the optimality principle “emotional space” shows whether a metaphor triggers the same emotions it arose from. So, the question is not just “Does the theorist’s emotional compass erupt?”, it is also “Is the metaphor qualified to trigger similar emotion in others?” This process is an example of how it is only the use of emotions that leads to better, more robust meaning and, as such, enriches the conceptualization of the setting and the shared understanding of it. This is why allowing emotions to have their say may result in better theorizing. The “settled emergency” metaphor complies with seven of the eight optimality principles and qualifies to be apt and fitting to capture the whole situation in a single term. However, the fact that it provides an additional emotional understanding makes it especially meaningful.

Theory-building is a form of sensemaking, and if we let our emotions speak, then our emotions are interwoven with the emotions of others through conversations. Had I not examined my feelings about the working system that was in place, had I not asked why this issue came up again and again, I might have missed the holistic nature of the setting.

Engaging with emotions is a method to approach a conceptual leap, which we might call “emotional abductive leaping.” As theory construction can be improved through thought trials that make the process of metaphorical imagination more explicit (Cornelissen, 2006a), I argue that we should complement this by passing

through feel-trials. Weick (1989) demands that, in order to build better theory, theorists have to think better. They should also feel more deeply.

4.6 Concluding thoughts

Embracing emotions for scholarly work should not be misunderstood as an “everything goes” approach. Nor should it be considered as a shortcut around scientific rigor. It is the opposite: working with one’s emotions is an added discomfort that often hurts. It challenges researchers in ways that become very personal very quickly. In a terrain where very little is certain, one thing is: the confrontation and engagement with one’s own emotions is utterly time-consuming, not only in the sense that it takes time to actually grasp them but also in the sense that they are ever shifting, warranting constant questioning of what we assumed to be clear and understood.

Let us become more literate in expressing our emotions and the emotional processes within us. Let us accept all emotions as they are and not judge and classify them into simplified good or bad categories, because every emotion affects our sensemaking. Let us become more literate in observing our emotions and how they influence our sensemaking – like an intuitive helmsman through our own clouded judgment.

Hage (2009) warns that “talking about emotions still carries with it the danger of making ‘knowing the self’ a substitute to knowing the otherness” (p. 62). Behar (2014) contends that subjectivity in social observation is only valuable if it reveals something about the case studied, adding that this “doesn’t require a full-length autobiography, but it does require a keen understanding of what aspects of the self are the most important filters through which one perceives the world and, more particularly, the topic being studied. [...] The exposure of the self [...] has to take us somewhere we couldn’t otherwise get to” (Behar, 2014, p. 14).

Deconstructing the interaction between my emotions and my sensemaking led to the abductive development of a theory which is expressed by the metaphor “settled emergency.” The triggers to build the theory behind the metaphor were my realizations that “something is wrong here” and “this really matters.” It was by no means clear from the beginning that systematic failures in the management of the

emergency were what provoked my deepest emotional reactions. Through coding and reflexivity of my own emotions, a theory emerged over a long iterative process of reflection, feeling frustrated about failing to communicate the situation's complex and paradoxical nature in a concise way. It was important for my own emotional health to not work with misleading simplifications. So, the triggering of strong emotions ultimately resulted in the development of a metaphor that fully encompasses the systematic, conscious nature of an ethically ambiguous situation.

Researchers' emotions during research are surely not the most significant subject of study, nor are they just a stylistic gadget. These emotions can direct research towards what really matters and help us to draw conclusions that build relevant and reliable theories. If, when re-reading our own writing, it seems correct but our emotional compass remains still, it might be a sign that we have missed the actual point. Abductive feeling can ultimately lead to more considerable and meaningful theoretical products (like metaphors, frameworks, or other constructs) than the alleged pure cognitive approach in past work.

Applying reflexive practice and engaging with emotions may expose us to feeling less certain. While this is especially unpleasant for researchers, it does not impact the validity of our results – they were already biased prior to our engagement with our subjective frames of reference, reflexivity, and emotional work. We were simply not aware of it before. What we can do to counter this is to be more reflective of the abductive leaps we take and how these were driven and influenced by our emotions.

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Chapter 5

CONCLUSION

*Such is the foolishness of mortal beings:
when they borrow the smallest, cheapest items, such as can easily be replaced,
they acknowledge the debt, but no one considers himself indebted for taking up
our time. Yet this is the one loan that even those who are grateful cannot repay.*

– Lucius Annaeus Seneca

What we spend our time on is a crucial question for organizations and individuals, as is the question of the ownership of time. Is it worth spending time and money on issues of organizational identity (OI)? Is the time refugees spend in limbo ours to waste? Is engaging with emotions in the context of scholarship time well spent? By revising the main findings and conclusions of the three studies in this dissertation, this chapter will provide new insights to the above and further questions. It will discuss the limitations of each chapter in the hope that these limitations will provide starting points for future research.

5.1 Summary of main findings and contributions Chapter 2

In the systematic literature review, we synthesized past research into a multi-level, multi-theory framework, which brings conceptual order to a fragmented literature. The framework categorizes definitions of OI, based on the locus of the OI: narratives, cognitions, group-membership, discourse, behavior, or institution. Furthermore, we brought together various understandings and findings from different research traditions regarding value creation through OI and the underlying cause-and-effect mechanisms. We discovered that many mechanisms surrounding the OI construct actually destroy value or act as a block to further value creation. These mechanisms of value destruction are often opportunity costs, as they keep an organization from tapping into its potential.

The most frequent causal relation is that OI needs to be strong to create value. However, OI usually acts as a hindrance to change. A possible solution for this could be the introduction of a meta-identity, where OI is defined and managed by all stakeholders, having a binding function while leaving room for organizational development.

5.1.1 Implications for practice Chapter 2

If OI is such a determining factor for organizations, it is important to have awareness of it and its mode of action, otherwise we cannot use it and can only observe its effects, which we either do not question or do not understand. Managers need to develop a consciousness towards OI at the different levels of analysis: in organizations, in groups, and on an individual level. We recommend that organizations give their members permission to evolve instead of ordering them to change, and we argue for a new breed of consultants who are trained in this.

We agree with the conclusions drawn by Scott and Lane (2000b) that “the rise of the ‘external strategic consultant’ is, to some degree, a by-product of the struggle by organizations to come to terms with themselves” (p. 144). There is a need for the development of wise, self-reflecting, and psychologically skilled consultants who support organizations in similar ways to those in which psychologists aid individuals. Rather than being just another managerial tool, OI should be of particular interest to those who are seeking to structure and harness the potentials of an organization.

5.1.2 Limitations and future work Chapter 2

A natural limitation of Chapter 2 is that it is constrained to 17 journals. A further limitation is that the presented links to value creation are not always based on a replicable study and are rooted in various research traditions. Although there are academic grounds for this, it may be difficult for practitioners to distinguish between a discursive and a narrative locus.

Future studies should not limit themselves to one research tradition alone. Research on a unifying meta-identity seems promising. It could explore the role of a meta-identity in enabling the resilience of organizations and the ability of organizations to change. Interesting research questions could be: Can a unifying meta-identity be the solution to sub-identity conflicts? How should it be constructed and managed? How can it generate the greatest value? More research is desirable regarding the causal relation, which needs to be strong for OI to be able to create direct reputational or economic value (Melewar & Karaosmanoglu, 2006; Simoes, Dibb, & Fisk, 2005; Voss, Cable, & Voss, 2006). However, there is evidence that at the same time strong identities also bear the highest risk of destroying or, at least, impeding value creation.

5.2 Summary of main findings and contributions Chapter 3

Chapter 3 investigates processes across organizations and contributes to the literature on sensemaking, specifically regarding the part emotions play in the sensemaking process within extreme contexts. It addresses the research question: “How do people make sense of a grand societal challenge on the ground, what emotions do they form and how do they cope?”

We found that the context of forced displacement and the emergency response on Lesbos created breaking points for individuals’ sensemaking (Holt & Cornelissen, 2014). They triggered strong emotions, which could be mixed or even ambivalent, making coping necessary. Typical breaking points were the highly complex nature of the situation, the prolonged emergency operating mode of the response to arriving refugees on Lesbos, and the immediacy of the experienced suffering. Such breaking points were coped with differently, depending on role identities: citizens, volunteers and professionals. Passive coping mechanisms

include compartmentalizing (defined as managing boundaries and definitions) and attributing (representing, scapegoating and blaming behavior). Active coping mechanisms include transporting (referring to transporting oneself to another time and place) and resisting (with the notion of fighting the system in place). Coping was not a linear process, but a cyclical one.

The emotional responses of professionals seemed more controlled, as triggering conditions were perceived as part of the job. The triggered emotions were often resolved by focusing on the agency the actors had or by increasing their impact by changing the organizations they worked for. As volunteers were normally not engaged for as long as professionals, they tended to opt for reframing the impact they were capable of making and focused on small “wins.” Young people, in particular, had many ambivalent feelings, with a high level of emotional upheaval. We found that some citizens coped with the ambivalence of emotions passively, through attribution. Other citizens coped actively on the identity path, with their actions stemming from pride in Greek hospitality, and created their own alternative solutions.

Thus, the main findings of Chapter 3 are threefold. First, we offered an account of grand challenges on a human scale, detailing how people make sense of them when they are part of their everyday surroundings. Second, we identified “role identities” and built theory on how they influence the way that individuals make sense of their situation, resulting in six coping paths. Third, we found the influence of “ambivalent emotions” which, once constructed by individuals as part of their sensemaking, helps them cope in a way that is simultaneously involved and dispassionate. Overall, our main contribution is the cyclical pathway model of how different role identities at the bottom of a grand challenge make sense and cope.

5.2.1 Implications for practice Chapter 3

We give insights on how members or organizations deal with grand societal challenges in relation to their role identity. This provides options to support their coping work. We also provide orientation regarding typical emotional reactions and the coping that follows. Further implications include insights on costs incurred in this context which are unaccounted for so far. These costs come on top of the psychological trauma imposed. These findings provide valuable insights for other

extreme settings that deal with hyper-complexity, multi-level stakeholder groups and imbalance between actors.

Table 5.1 Summary of findings and contributions of studies in dissertation

	<i>Chapter 2</i>	<i>Chapter 3</i>	<i>Chapter 4</i>
<i>Main findings</i>	<p>For OI to be able to create value it needs to be strong.</p> <p>However, a strong OI can also act as a hindrance to change and value creation.</p>	<p>The influence of “ambivalent emotions” and role identities on the sensemaking and coping of individuals.</p>	<p>Researchers’ emotions influence their sensemaking and can facilitate theory building.</p> <p>An emergency situation that should be intrinsically dynamic is in fact static.</p>
<i>Key contributions</i>	<p>Multi-level, multi-theory framework that introduces locus categories to synthesize multiple definitions of OI.</p> <p>Collection of value creations in the various locus categories.</p> <p>Introduction of a meta-identity interface to regulate struggling sub-identities in organizations.</p>	<p>Illuminating a grand challenge on an “individual scale,” detailing how people make sense of it when it is present in their day-to-day surroundings.</p> <p>A cyclical model of how individuals with different role identities make sense of and cope with a grand challenge.</p>	<p>A contribution to the discourse on emotions in reflexive practices and theory building.</p> <p>Development of the “settled emergency” metaphor to describe a context where an unbearable situation is perpetuated by informal dynamics.</p>

5.2.2 Limitations and future work Chapter 3

The case study in Chapter 3 is set in an exceptional geographical, socio-historic and cultural context. Although our interviews were equally distributed between females and males, we realized that the men interviewed worked to a significantly greater extent in paid engagement and held higher power positions, while women often worked in unpaid engagement. A deeper investigation into these research areas in this context appears to be warranted.

We do not claim that the prototypical pathways cover every sensemaking journey of every individual with a certain role identity. The intention was to identify categories, not to exhaust them. This also applies to our debatable analytical decision to combine the enormous diversity of NGO, GO and TSO workers and employees into a role identity called “professionals.” This provides a starting point to investigate whether individuals who proceed on the prototypical career path at the TSO level are actually capable of having an impact on grand challenges or whether they merely exercise individual coping.

5.3 Summary of main findings and contributions Chapter 4

As management and organization studies tend to be conducted in extreme contexts, this increases the probability that researchers will experience strong emotions. It is time not only to accept emotions in the reflexive process but to actively use them as a resource for theory building. I drew on my experiences while conducting a case study on the Greek island of Lesbos in the aftermath of the European refugee crisis in 2017 and 2018. I elaborated on how my emotions led me to develop the metaphor of a “settled emergency” to describe the multifaceted situation of the context.

The main findings are threefold. First and foremost, the essay contributes to the methodological discourse on emotions, arguing for their inclusion in reflexive practices and theory building. Second, it adds to the literature on extreme context research. Third, the study introduced the metaphor of a “settled emergency” to describe a situation that is not only found in the specific case study but in many organizational contexts where an unbearable situation is perpetuated by informal dynamics.

There is consensus that reflexivity is the key method of quality control in qualitative research (Alvesson, Hardy, & Harley, 2008; Berger, 2015; Gray, 2019). Alvesson and colleagues (2008) speak of “reflexivities,” four practices that are the result of a critical synthesis of existing literature. “Destabilizing” and “positioning” are related to the deconstruction of positive claims. “Multi-perspective” and “multi-voicing” focus on alternate points of view and the creation of new knowledge (Alvesson et al., 2008). Gray (2019) adds another two practices: reflecting on one’s own “proclivities and biases” and reflecting on one’s “choice of a research topic.” I relied on these six reflexivities in my own research, and subsequently included a seventh (“engagement with one’s own emotions”) which I advocate to add to the understanding of a fully reflexive research process.

Everything in the case study context seemed to revolve around a paradoxical inertness of the situation. As stakeholders were trying to end an emergency, the situation should have been intrinsically dynamic, but it was in fact static. In response to this, I developed the metaphor (Cornelissen, 2005, 2006a) of a “settled emergency” which derives from Swidler’s “settled cultures” (Swidler, 1986) and has six components: 1. the circle of blame in a competitive arena; 2. profiteering from the status quo; 3. fear of punishment when tackling the fundamentals; 4. no capacity building taking place (in the case of Lesbos); 5. high staff turnover; and 6. boredom. Components 1, 2 and 3 are also present in other static emergencies in other contexts as well, while components 4, 5 and 6 seem to be more specific to a humanitarian context.

As metaphors also play a crucial role in the theory building process itself, I furthermore elaborated on the abductive leaps in my theory building and how through thought trails and feel trails different metaphors were dismissed in the process. I elaborated on how, through the mediation of experienced emotions and the need to reflect them in the metaphor itself, a decision about which of the metaphors was most meaningful could be made. This led to the conclusion that part of the aptness of a metaphor is its ability to transport intuitive emotional understanding of the depicted phenomena.

5.3.1 Implications for practice Chapter 4

The proposed “settled emergency” metaphor serves as an apt description for a hyper-complex context and provides important vocabulary for a situation that also exists in other organizational contexts.

For qualitative researchers, the reflexive methods used, which were also directed forward for theory development, provide tools to check research and theory development for bias. Proposed feel trails as complements to thought trails (Weick, 1989) offer a way to enrich theory building through using emotions in a reflexive manner.

5.3.2 Limitations and future work Chapter 4

Even the most proficient observer is unable to give a completely objective and unbiased testimony of the social world. Reflexive practices do not come without limitations. It is thus a paradox that by applying multi-perspective practice I created a new metaphor, while at the same time arguing that no single viewpoint can account for the entire reality. This provides a starting point for future research and additional perspectives on what I described as a “settled emergency.” It could be enlightening to compare, within one study, experiences, emotions and sensemaking through reflexive practices across various individual researchers. Also, the use of emotions in theory building and the topic of emotional abductive leaps remains in its infancy and warrants future work.

5.4 Concluding remarks

This dissertation was practitioner inspired and intended to combine real-world problems with academic knowledge and research. I hope it will create value for a variety of stakeholders: researchers, practitioners and policy makers.

Also, my own identity has changed over the course of this dissertation journey: from that of a senior consultant, to PhD student, to volunteer in the field, to researcher. My own sensemaking led me to experience several full-circle moments – for example, realizing that the future of Europe’s understanding of humanism is being tested where it began, in Greece. In this context Binder and Heilmann (2017, pp. 560) stated: “it is not geographical location per se that matters, but the

correlation between geographical proximity and (a possibly unique) position to help, that creates the specific duty of a state or a union of states to help refugees arriving at its borders.”

This dissertation strives to be a tool for value creation in organizations, public policy making and private decision taking, with the timid hope of potentially also inspiring moral value creation.

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Appendices

Appendix 2.I Systematic literature review data-set for content analysis

	Authors	Year	Journal	Title
1.	Abratt, R., & Kleyn, N.	2012	EJM	Corporate identity, corporate branding and corporate reputations reconciliation and integration.
2.	Alvesson, M.	1994	OS	Talking in organizations – managing identity and impressions in an advertising agency.
3.	Alvesson, M.	2000	JOMS	Social identity and the problem of loyalty in knowledge-intensive companies.
4.	Alvesson, M., & Willmott, H.	2002	JOMS	Identity regulation as organizational control: Producing the appropriate individual.
5.	Alvesson, M., & Robertson, M.	2016	OS	Money matters: Teflonic identity manoeuvring in the investment banking sector.
6.	Anand, V., Joshi, M., & O’Leary-Kelly, A.M.	2013	JOOS	An organizational identity approach to strategic groups.
7.	Anteby, M., & Molnar, V.	2012	AMJ	Collective memory meets organizational identity: Remembering to forget in a firm’s rhetorical history.
8.	Ashforth, B.E., & Mael.	1989	AMR	Social identity theory and the organization.
9.	Ashforth, B.E., Rogers, K.M., & Corley, K. G.	2011	JOOS	Identity in organizations: Exploring cross-level dynamics.
10.	Aspara, J., & Tikkanen, H.	2011	EJM	Corporate marketing in the stock market: The impact of company identification on individuals’ investment behavior.
11.	Baker, M.J., & Balmer, J.M.T.	1997	EJM	Visual identity: Trappings or substance?
12.	Balmer, J.M.T.	1997	EJM	Corporate identity, corporate branding and corporate marketing: Seeing through the fog.
13.	Balmer, J.M.T., & Gray, E.R.	2003	EJM	Corporate brands: What are they? What of them?

	Authors	Year	Journal	Title
14.	Bartel, C.A.	2001	ASQ	Social comparisons in boundary-spanning work: Effects of community outreach on members' organizational identity and identification.
15.	Battilana, J., & Dorado, S.	2010	AMJ	Building sustainable hybrid organizations: The case of commercial microfinance organizations.
16.	Berger, I.E., Cunningham, P.H., & Drumwright, M.E.	2006	JAMS	Identity, identification, and relationship through social alliances.
17.	Brickson, S.L.	2000	AMR	The impact of identity orientation on individual and organizational outcomes in demographically diverse settings.
18.	Brickson, S.L.	2005	ASQ	Organizational identity orientation, forging a link between organizational identity and organizations' relations with stakeholders.
19.	Brickson, S.L.	2007	AMR	Organizational identity orientation: The genesis of the role of the firm and distinct forms of social value.
20.	Brickson, S.L.	2013	JOOS	Athletes, best friends, and social activists: An integrative model accounting for the role of identity in organizational identification.
21.	Bromley, D.B.	2001	EJM	Relationships between personal and corporate reputation.
22.	Brønn, P.S., Engell, A., & Martinsen, H.	2006	EJM	A reflective approach to uncovering actual identity.
23.	Brown, A.D.	1997	AMR	Narcissism, identity, and legitimacy.
24.	Brown, A.D.	2006	JOMS	A narrative approach to collective identities.
25.	Brown, A.D., & Humphreys, M.	2002	BJM	Nostalgia and the narrativization of identity: A Turkish case study.
26.	Brown, A.D., & Humphreys, M.	2006	JOMS	Organizational identity and place: A discursive exploration of hegemony and resistance.
27.	Brown, A.D., & Starkey, K.	2000	AMR	Organizational identity and learning: A psychodynamic perspective.
28.	Brown, A.D., Ainsworth, S., & Grant, D.	2012	OS	The rhetoric of institutional change.

	Authors	Year	Journal	Title
29.	Brown, A.D., & Toyoki, S.	2013	OS	Identity work and legitimacy.
30.	Brown, T.J., Dacin, P.A., Pratt, M.G., & Whetten, D.A.	2006	JAMS	Identity, intended image, construed image, and reputation: An interdisciplinary framework and suggested terminology.
31.	Bundy, J., Shropshire, C., & Buchholtz, A.K.	2013	AMR	Strategic cognition and issue salience: Toward an explanation of firm responsiveness to stakeholder concerns.
32.	Burghausen, M., & Balmer, J.M.T.	2015	EJM	Corporate heritage identity stewardship: A corporate marketing perspective.
33.	Cable, D.M., Gino, F., & Staats, B.R.	2013	ASQ	Breaking them in or eliciting their best? Reframing socialization around newcomers' authentic self-expression.
34.	Cannella, A.A., Jr., Jones, C.D., & Withers, M.C.	2015	AMJ	Family- versus lone-founder-controlled public corporations: Social identity theory and boards of directors.
35.	Carlsen, A.	2006	JOOS	Organizational becoming as dialogic imagination of practice: The case of the indomitable Gauls.
36.	Cayla, J., & Penalzoza, L.	2012	JM	Mapping the play of organizational identity in foreign market adaptation.
37.	Cheng, R., Hines, T., & Grime, I.	2008	EJM	Desired and perceived identities of fashion retailers.
38.	Chreim, S.	2005	JOMS	The continuity-change duality in narrative texts of organizational identity.
39.	Christensen, L.T.	1995	OS	Buffering organizational identity in the marketing culture.
40.	Christensen, L.T., & Askegaard, S.	2001	EJM	Corporate identity and corporate image revisited: A semiotic perspective.
41.	Christianson, M.K., Farkas, M.T., Sutcliffe, K.M., & Weick, K.E.	2009	JOOS	Learning through rare events: Significant interruptions at the Baltimore & Ohio railroad museum.
42.	Chun, R., & Davies, G.	2006	JAMS	The influence of corporate character on customers and employees: Exploring similarities and differences.
43.	Ciborra, C.U.	1996	JOOS	The platform organization: Recombining strategies, structures, and surprises.

	Authors	Year	Journal	Title
44.	Clark, S.M., Gioia, D.A., Ketchen, D.J., Jr., & Thomas, J.B.	2010	ASQ	Transitional identity as a facilitator of organizational identity change during a merger.
45.	Clegg, S.R., Rhodes, C., & Kornberger, M.	2007	OS	Desperately seeking legitimacy: Organizational identity and emerging industries.
46.	Colman, H.L., & Lunnan, R.	2011	JOMS	Organizational identification and serendipitous value creation in post-acquisition integration.
47.	Cooren, F., Kuhn, T., Cornelissen, J., & Clark, T.	2011	OS	Communication, organizing and organization: An overview and introduction to the special issue.
48.	Corley, K.G., & Gioia, D.A.	2004	ASQ	Identity ambiguity and change in the wake of a corporate spin-off.
49.	Cornelissen, J.P.	2002	BJM	On the “organizational identity” metaphor.
50.	Cornelissen, J.P.	2006	JOMS	Metaphor and the dynamics of knowledge in organization theory: A case study of the organizational identity metaphor.
51.	Cornelissen, J.P., Christensen, L.T., & Kinuthia, K.	2012	EJM	Corporate brands and identity: Developing stronger theory and a call for shifting the debate.
52.	Cornelissen, J., Haslam, S.A., & Balmer, J.M.T.	2007	BJM	Social identity, organizational identity and corporate identity: Towards an integrated understanding of processes, patternings and products.
53.	Coupland, C., & Brown, A. D.	2004	JOMS	Constructing organizational identities on the web: A case study of royal Dutch/Shell.
54.	Covaleski, M.A., Dirsmith, M.W., Heian, J.B., & Samuel, S.	1998	ASQ	The calculated and the avowed: Techniques of discipline and struggles over identity in big six public accounting firms.
55.	Davenport, S., & Daellenbach, U.	2011	BJM	“Belonging” to a virtual research centre: Exploring the influence of social capital formation processes on member identification in a virtual organization.
56.	Dobusch, L., & Schoeneborn, D.	2015	JOMS	Fluidity, identity, and organizationality: The communicative constitution of anonymous.
57.	Driver, M.	2009	OS	Struggling with lack: A lacanian perspective on organizational identity.

	Authors	Year	Journal	Title
58.	Drori, I., Wrzesniewski, A., & Ellis, S.	2013	JOOS	One out of many? Boundary negotiation and identity formation in postmerger integration.
59.	Dukerich, J.M., Golden, B. R., & Shortell, S.M.	2002	ASQ	Beauty is in the eye of the beholder: The impact of organizational identification identity and image on the cooperative behaviors of physicians.
60.	Dutton, J.E., & Dukerich, J.M.	1991	AMJ	Keeping an eye on the mirror: Image and identity in organizational adaptation.
61.	Dutton, J.E., Dukerich, J.M., & Harquail, C.V.	1994	ASQ	Organizational images and member identification.
62.	Edman, J.	2016	JOMS	Cultivating foreignness: How organizations maintain and leverage minority identities.
63.	Elsbach, K.D., & Kramer, R.M.	1996	ASQ	Members' responses to organizational identity threats: Encountering and countering the business week rankings.
64.	Elsbach, K.D., & Flynn, F.J.	2013	JOMS	Creative collaboration and the self-concept: A study of toy designers.
65.	Fauchart, E., & Gruber, M.	2011	AMJ	Darwinians, communitarians, and missionaries: The role of founder identity in entrepreneurship.
66.	Fiol, C. M.	2002	JOOS	Capitalizing on paradox: The role of language in transforming organizational identities.
67.	Fiol, C.M., Pratt, M.G., & O'Connor, E.J.	2009	AMR	Managing intractable identity conflicts.
68.	Fiol, C.M., & Romanelli, E.	2012	JOOS	Before identity: The emergence of new organizational forms.
69.	Fisher, G., Kotha, S., & Lahiri, A.	2015	AMR	Changing with the times: An integrated view of identity, legitimacy and new venture life cycles.
70.	Fombelle, P.W., Jarvis, C.B., Ward, J., & Ostrom, L.	2012	JAMS	Leveraging customers' multiple identities: Identity synergy as a driver of organizational identification.
71.	Foreman, P., & Whetten, D.A.	2002	JOOS	Members' identification with multiple-identity organizations.
72.	Galvin, B.M., Lange, D., & Ashforth, B.E.	2015	AMR	Narcissistic organizational identification: Seeing oneself as central to the organization's identity.

	Authors	Year	Journal	Title
73.	Gioia, D.A., Schultz, M., & Corley, K.G.	2000	AMR	Organizational identity, image, and adaptive instability.
74.	Gioia, D.A., & Thomas, J.B.	1996	ASQ	Identity, image, and issue interpretation: Sensemaking during strategic change in academia.
75.	Gioia, D.A., Price, K.N., Hamilton, A.L., & Thomas, J.B.	2010	ASQ	Forging an identity: An insider-outsider study of processes involved in the formation of organizational identity.
76.	Glynn, M.A.	2000	JOOS	When cymbals become symbols: Conflict over organizational identity within a symphony orchestra.
77.	Glynn, M.A., & Abzug, R.	2002	AMJ	Institutionalizing identity: Symbolic isomorphism and organizational names.
78.	Golden-Biddle, K., & Rao, H.	1997	JOOS	Breaches in the boardroom: Organizational identity and conflicts of commitment in a nonprofit organization.
79.	Grant, A.M., Dutton, J.E., & Rosso, B.D.	2008	AMJ	Giving commitment: Employee support programs and the prosocial sensemaking process.
80.	Handelman, J.M.	2006	JAMS	Corporate identity and the societal constituent.
81.	Hardy, C., Lawrence, T.B., & Grant, D.	2005	AMR	Discourse and collaboration: The role of conversations and collective identity.
82.	Harquail, C.V., & King, A.W.	2010	OS	Construing organizational identity: The role of embodied cognition.
83.	Haslam, S.A., Postmes, T., & Ellemers, N.	2003	BJM	More than a metaphor: Organizational identity makes organizational life possible.
84.	Hatch, M.J., & Schultz, M.	1997	EJM	Relations between organizational culture, identity and image.
85.	Hatch, M.J., & Yanow, D.	2008	OS	Methodology by metaphor: Ways of seeing in painting and research.
86.	He, H.	2012	EJM	Corporate identity anchors: A managerial cognition perspective.
87.	He, H., & Balmer, J.M.T.	2007	EJM	Identity studies: Multiple perspectives and implications for corporate-level marketing.

	Authors	Year	Journal	Title
88.	He, H., & Balmer, J.M.T.	2013	EJM	A grounded theory of the corporate identity and corporate strategy dynamic: A corporate marketing perspective.
89.	He, H., & Baruch, Y.	2010	BJM	Organizational identity and legitimacy under major environmental changes: Tales of two UK building societies.
90.	Holmer-Nadesan, M.	1996	OS	Organizational identity and space of action.
91.	Howard-Grenville, J., Metzger, M.L., & Meyer, A. D.	2013	AMJ	Rekindling the flame: Processes of identity resurrection.
92.	Hsu, G., & Hannan, M.T.	2005	JOOS	Identities, genres, and organizational forms.
93.	Hsu, G., & Elsbach, K.D.	2013	JOOS	Explaining variation in organizational identity categorization.
94.	Humphreys, M., & Brown, A.D.	2002 a	JOMS	Dress and identity: A Turkish case study.
95.	Humphreys, M., & Brown, A.D.	2002 b	OS	Narratives of organizational identity and identification: A case study of hegemony and resistance.
96.	Huzzard, T., & Östergren, K.	2002	BJM	When norms collide: Learning under organizational hypocrisy.
97.	Jack, G., & Lorbiecki, A.	2007	BJM	National identity, globalization and the discursive construction of organizational identity.
98.	Jarventie-Thesleff, R., & Tienari, J.	2016	OS	Roles as mediators in identity work.
99.	Jay, J.	2013	AMJ	Navigating paradox as a mechanism of change and innovation in hybrid organizations.
100.	Joshi, A., Dencker, J.C., Franz, G., & Martocchio, J.J.	2010	AMR	Unpacking generational identities in organizations.
101.	Kärreman, D., & Alvesson, M.	2001	OS	Making newsmakers: Conversational identity at work.
102.	Kärreman, D., & Rylander, A.	2008	OS	Managing meaning through branding: The case of a consulting firm.
103.	Karthikeyan, S.I., Jonsson, S., & Wezel, F.C.	2015	JOOS	The travails of identity change: Competitor claims and distinctiveness of British political parties, 1970-1992.

	Authors	Year	Journal	Title
104.	Kilduff, M., Funk, J.L., & Mehra, A.	1997	JOOS	Engineering identity in a Japanese factory.
105.	King, B.G., Clemens, E.S., & Fry, M.	2011	JOOS	Identity realization and organizational forms: Differentiation and consolidation of identities among Arizona's charter schools.
106.	Kjaergaard, A., Morsing, M., & Ravasi, D.	2011	JOMS	Mediating identity: A study of media influence on organizational identity construction in a celebrity firm.
107.	Kodeih, F., & Greenwood, R.	2014	OS	Responding to institutional complexity: The role of identity.
108.	Koerner, M.M.	2014	AMJ	Courage as identity work: Accounts of workplace courage.
109.	Kogut, B., & Zander, U.	1996	JOOS	What firms do? Coordination, identity, and learning.
110.	Koppman, S., Mattarelli, E., & Gupta, A.	2016	JOOS	Third-world "Sloggers" or elite global professionals? Using organizational toolkits to redefine work identity in information technology offshore outsourcing.
111.	Korschun, D.	2015	AMR	Boundary-spanning employees and relationships with external stakeholders: A social identity approach.
112.	Kreiner, G.E., Hollensbe, E., Sheep, M.L., Smith, B.R., & Kataria, N.	2015	AMJ	Elasticity and the dialectic tensions of organizational identity: How can we hold together while we are pulling apart?
113.	Kuilman, J., & Li, J.	2006	JOOS	The organizers' ecology: An empirical study of foreign banks in Shanghai.
114.	Labianca, G., Fairbank, J.F., Thomas, J.B., Gioia, D.A., & Umphress, E.E.	2001	JOOS	Emulation in academia: Balancing structure and identity.
115.	Leavitt, K., & Sluss, D.M.	2015	AMR	Lying for who we are: An identity-based model of workplace dishonesty.
116.	Leitch, S., & Davenport, S.	2011	EJM	Corporate identity as an enabler and constraint on the pursuit of corporate objectives.
117.	Lievens, F., van Hoye, G., & Anseel, F.	2007	BJM	Organizational identity and employer image: Towards a unifying framework.

Authors	Year	Journal	Title
118. Liston-Heyes, C., & Liu, G.	2013	EJM	A study of non-profit organisations in cause-related marketing stakeholder concerns and safeguarding strategies.
119. Liu, M., & Wezel, F.C.	2015	JOOS	Davids against Goliath? Collective identities and the market success of peripheral organizations during resource partitioning.
120. Livengood, R.S., & Reger, R.K.	2010	AMR	That's our turf! Identity domains and competitive dynamics.
121. Llewellyn, N.	2004	OS	In search of modernization: The negotiation of social identity in organizational reform.
122. Lok, J.	2010	AMJ	Institutional logics as identity projects.
123. Maguire, S., & Phillips, N.	2008	JOMS	"Citibankers" at Citigroup: A study of the loss of institutional trust after a merger.
124. Marin, L., & Ruiz de Maya, S.	2013	EJM	The role of affiliation, attractiveness and personal connection in consumer-company identification.
125. Markwick, N. & Fill C.	1997	EJM	Towards a framework for managing corporate identity.
126. Martin, K.D., Johnson, J.L., & French, J.J.	2011	JAMS	Institutional pressures and marketing ethics initiatives: The focal role of organizational identity.
127. Martins, L.L.	2005	JOOS	A model of the effects of reputational rankings on organizational change.
128. Mattarelli, E., & Tagliaventi, M.R.	2015	JOMS	How offshore professionals' job dissatisfaction can promote further offshoring: Organizational outcomes of job crafting.
129. Melewar, T.C., & Karaosmanoglu, E.	2006	EJM	Seven dimensions of corporate identity: A categorisation from the practitioners' perspectives.
130. Miller, D., Le Breton-Miller, I., & Lester, R.H.	2011	JOMS	Family and lone founder ownership and strategic behavior: Social context, identity, and institutional logics.
131. Millward, L.J., Haslam, S.A., & Postmes, T.	2007	JOOS	Putting employees in their place: The impact of hot desking on organizational and team identification.
132. Millward, L.J., & Postmes, T.	2010	BJM	Who we are affects how we do: The financial benefits of organizational identification.
133. Milton, L.P., & Westphal, J.D.	2005	AMJ	Identity confirmation networks and cooperation in work groups.

	Authors	Year	Journal	Title
134.	Moingeon, B. & Ramanantsoa, B.	1997	EJM	Understanding corporate identity: The French school of thought.
135.	Motion, J., & Leitch, S.	2009	OS	The transformational potential of public policy discourse.
136.	Moufahim, M., Reedy, P., & Humphreys, M.	2015	OS	The Vlaams Belang: The rhetoric of organizational identity.
137.	Muzellec, L.	2006	EJM	Corporate rebranding: Destroying, transferring or creating brand equity.
138.	Nag, R., Corley, K.G., & Gioia, D.A.	2007	AMJ	The intersection of organizational identity, knowledge, and practice: Attempting strategic change via knowledge grafting.
139.	Navis, C., & Glynn, M.A.	2011	AMR	Legitimate distinctiveness and the entrepreneurial identity: Influence on investor judgments of new venture plausibility.
140.	Nissley, N., & Casey, A.	2002	BJM	The politics of the exhibition: Viewing corporate museums through the paradigmatic lens of organizational memory.
141.	Nutt, P.C.	2004	JOMS	Organizational de-development.
142.	Oberg, C., Grundstrom, C., & Jonsson, P.	2011	EJM	Acquisitions and network identity change.
143.	Oliver, D., & Roos, J.	2011	BJM	Beyond text: Constructing organizational identity multimodally.
144.	Patvardhan, S.D., Gioia, D.A., & Hamilton, A. L.	2015	AMJ	Weathering a meta-level identity crisis: Forging a coherent collective identity for an emerging field.
145.	Perretti, F., Negro, G., & Lomi, A.	2008	JOOS	E pluribus unum: Framing, matching, and form emergence in US television broadcasting, 1940-1960.
146.	Phillips, D.J., & Kim, Y.	2009	JOOS	Why pseudonyms? Deception as identity preservation among jazz record companies, 1920-1929.
147.	Pratt, M.G., & Foreman, P.O.	2000	AMR	Classifying managerial responses to multiple organizational identities.
148.	Pratt, M.G., & Rafaeli, A.	1997	AMJ	Organizational dress as a symbol of multilayered social identities.

	Authors	Year	Journal	Title
149.	Rao, H., Davis, G.F., & Ward, A.	2000	ASQ	Embeddedness, social identity and mobility: Why firms leave the NASDAQ and join the New York stock exchange.
150.	Ravasi, D., & Schultz, M.	2006	AMJ	Responding to organizational identity threats: Exploring the role of organizational culture.
151.	Reger, R.K., Gustafson, L.T., Demarie, S.M., & Mullane, J.V.	1994	AMR	Reframing the organization: Why implementing total quality is easier said than done.
152.	Rindova, V., Dalpiaz, E., & Ravasi, D.	2011	JOOS	A cultural quest: A study of organizational use of new cultural resources in strategy formation.
153.	Rink, F., & Ellemers, N.	2007	BJM	Diversity as a basis for shared organizational identity: The norm congruity principle.
154.	Robertson, M., & Swan, J.	2003	JOMS	Control – what control? Culture and ambiguity within a knowledge intensive firm.
155.	Robichaud, D., Giroux, H., & Taylor, J.R.	2004	AMR	The metaconversation: The recursive property of language as a key to organizing.
156.	Rodrigues, S., & Child, J.	2008	JOMS	The development of corporate identity: A political perspective.
157.	Santos, F.A., & Eisenhardt, K.A.	2005	JOOS	Organizational boundaries and theories of organization.
158.	Schultz, M., & Hernes, T.	2013	JOOS	A temporal perspective on organizational identity.
159.	Scott, S. G., & Lane, V. R.	2000	AMR	A stakeholder approach to organizational identity.
160.	Sethi, R.	2000	JAMS	Superordinate identity in cross-functional product development teams: Its antecedents and effect on new product performance.
161.	Sharma, S.	2000	AMJ	Managerial interpretations and organizational context as predictors of corporate choice of environmental strategy.
162.	Sikavica, K., & Pozner, J.	2013	OS	Paradise sold: Resource partitioning and the organic movement in the US farming industry.
163.	Simoës, C., Dibb, S., & Fisk, R.P.	2005	JAMS	Managing corporate identity: An internal perspective.

Authors	Year	Journal	Title
164. Simoes, C., & Mason, K.J.	2012	EJM	Informing a new business-to-business relationship: Corporate identity and the emergence of a relationship identity.
165. Smith, E.B.	2011	ASQ	Identities as lenses: How organizational identity affects audiences' evaluation of organizational performance.
166. Stein, M.	2015	BJM	Double trouble: Sibling rivalry and twin organizations in the 2008 credit crisis.
167. Still, M.C., & Strang, D.	2009	ASQ	Who does an elite organization emulate?
168. Swaminathan, A.	2001	AMJ	Resource partitioning and the evolution of specialist organizations: The role of location and identity in the US wine industry.
169. Tanghe, J., Wisse, B., & van der Flier, H.	2010	BJM	The formation of group affect and team effectiveness: The moderating role of identification.
170. Taylor, J.R.	2011	OS	Organization as an (imbricated) configuring of transactions.
171. Topalian, A.	2003	EJM	Experienced reality: The development of corporate identity in the digital era.
172. Tracey, P., & Phillips, N.	2015	AMJ	Managing the consequences of organizational stigmatization: Identity work in a social enterprise.
173. Tripsas, M.	2009	JOOS	Technology, identity, and inertia through the lens of "the digital photography company".
174. Ullrich, J., Wieseke, J., Christ, O., Schulze, M., & van Dick, R.	2007	BJM	The identity-matching principle: Corporate and organizational identification in a franchising system.
175. Urde, M.	2003	EJM	Core value-based corporate brand building.
176. Vaara, E., & Tienari, J.	2011	JOOS	On the narrative construction of multinational corporations: An antenarrative analysis of legitimation and resistance in a cross-border merger.
177. Van den Bosch, A.L.M., Elving, W.J.L., & de Jong, M.D.T.	2006	EJM	The impact of organisational characteristics on corporate visual identity.

	Authors	Year	Journal	Title
178.	Van Dick, R., Grojean, M.W., Christ, O., & Wieseke, J.	2006	BJM	Identity and the extra mile: Relationships between organizational identification and organizational citizenship behavior.
179.	Van Rekom, J.	1997	EJM	Deriving an operational measure of corporate identity.
180.	Van Riel, C.B.M., & Balmer, J.M.T.	1997	EJM	Corporate identity: The concept, its measurement and management.
181.	Van Riel, C.B.M., & van den Ban, A.	2001	EJM	The added value of corporate logos: An empirical study.
182.	Venable, B.T., Rose, G.M., Bush, V.D., & Gilbert, F.W.	2005	JAMS	The role of brand personality in charitable giving: An assessment and validation.
183.	Verhaal, J.C., Khessina, O.M., & Dobrev, S.D.	2015	JOOS	Oppositional product names, organizational identities, and product appeal.
184.	Voss, Z.G., Cable, D.M., & Voss, G.B.	2006	JOOS	Organizational identity and firm performance: What happens when leaders disagree about “who we are?”.
185.	Wry, T., Lounsbury, M., & Glynn, M.A.	2011	JOOS	Legitimizing nascent collective identities: Coordinating cultural entrepreneurship.
186.	Xu, D., Lu, J.W., & Gu, Q.	2014	ASQ	Organizational forms and multi-population dynamics: Economic transition in China.
187.	Ybema, S.	2010	OS	Talk of change: Temporal contrasts and collective identities.
188.	Zachary, M.A., McKenny, A.F., Short, J.C., Davis, K.M., & Wu, D.	2011	JAMS	Franchise branding: An organizational identity perspective.

Appendix 2.II OI cause-and-effect relations towards value creation & destruction

Study	Cause-and-effect relation
Battilana & Dorado, 2010	To be sustainable, new hybrid organizations need to create a common OI that strikes a balance between the various logics they combine.
Dutton & Dukerich, 1991	If organizations' members encounter a stark mismatch between their own identity and the OI, organizational members sense of who they are and what they stand for is under attack.
Dutton, Dukerich & Harquail, 1994	The greater the appeal of the perceived OI, the stronger a person's identification with the organization.
Dukerich, Golden & Shortell, 2002	The greater the appeal of the perceived OI, the higher the interpersonal cooperative behavior.
Fiol, 2002	A strong OI can severely hamper strategic moves and block managers from seeing unfamiliar possibilities.
Hardy, Lawrence & Grant, 2005	The discursive production of OI is a critical element in producing effective collaboration and ultimately the bonding of the organizations' members with the organization itself.
Holmer-Nadesan, 1996	Identification occurs when individuals accept the OI created in the discursive locus.
Livengood & Reger, 2010	A strong OI leads to value destruction in the form of overreaction in organizations' competitive domain and not considering options outside the cognitive competitive space.
Simoes & Mason, 2012	OI creates consistency in behavior and therewith successful relationship outcomes.
Tripsas, 2009	OI can prevent organizational learning, as well as the creation of new knowledge. A constraining force to value creation are battling sub-identities or unclear OI itself, as both block organizational members' action.
Voss, Cable & Voss, 2006	Top management divergent opinion on the OI resulted in lower net income. Organizational performance was lowest when disagreement about the OI was highest.
Ybema, 2010	Through reflective identity talks, organizations' members construct self-sensemaking and therewith develop the OI.

SUMMARY

In the lifecycle of an organization, there are mechanisms at work that reach beyond its functioning toward a goal. These complex, informal processes sometimes define an organization more than its basic operational premises. To investigate these phenomena, this dissertation begins with a systematic literature review (Chapter 2), which critically investigates how the formation and strength of an organization's identity are associated with value creation, providing a multi-level and multi-theory framework that introduces how organizational identity manifests and creates value.

Chapter 3, delves into a case study of refugee camps on the Greek island of Lesbos, in the context of the European response to arriving refugees. It explores the hidden mechanisms that are at play in a hyper-complex, multi-level stakeholder setting. It investigates how a local manifestation of the global grand challenge of forced displacement can trigger deeply felt emotions, and how such emotions impact individuals' sensemaking and coping strategies. The chapter expands on the various challenges faced by the stakeholders, the mixed and ambivalent emotions these challenges trigger, the role identities that the actors take on, and the sensemaking and coping paths they choose to make the situation bearable and understandable.

Such fieldwork makes researchers part of the setting, exposing them to the same situations and possibly triggering the same strong emotions. Chapter 4 therefore explores the impact of extreme context research on researchers' emotions and sensemaking, and argues for using emotions retrospectively not only as a means of validation in the context of reflexivity but also as a productive element of theory building.

As a whole, this dissertation aims to combine these perspectives on the informal, less obvious, and seldomly scrutinized dynamics to shed some light on these under-researched but highly influential elements of organizational life.

NEDERLANDSE SAMENVATTING (SUMMARY IN DUTCH)

In de levenscyclus van een organisatie zijn mechanismen aan het werk die verder gaan dan het functioneren naar een doel. Deze complexe, informele processen definiëren een organisatie soms meer dan haar operationele basisvoorzieningen. Bij het verkennen hiervan begint de dissertatie met een systematisch literatuuronderzoek (Hoofdstuk 2), waarin kritisch wordt onderzocht hoe de vorming en de kracht van de identiteit van een organisatie worden geassocieerd met waarde creatie. Hierbij wordt een multi-level en multi-theory raamwerk geboden dat introduceert hoe de identiteit van een organisatie zich manifesteert en waarde creëert.

Hoofdstuk 3 verdiept zich in een casestudy van vluchtelingenkampen op het Griekse eiland Lesbos, in de context van de Europese respons op aankomende vluchtelingen. Hoofdstuk 3 verkent de verborgen mechanismen die spelen in een hypercomplexe, multi-level-stakeholder omgeving. Het hoofdstuk onderzoekt hoe een lokale manifestatie van een globale “grand challenge” van gedwongen verplaatsing diepgevoelde emoties kan oproepen, en hoe dergelijke emoties een invloed hebben op de gevoels- en overlevingsstrategieën van individuen. Het hoofdstuk gaat dieper in op de verschillende uitdagingen waar de stakeholders voor staan, de gemengde en ambivalente emoties die deze uitdagingen oproepen, de rollen en identiteiten die de actoren op zich nemen, en de manieren van betekenis geven aan en omgaan met de situatie die zij kiezen om de situatie draaglijk en begrijpelijk te maken.

Dit soort veldwerk maakt de onderzoekers deel van de omgeving en stelt hen bloot aan dezelfde situaties en roept mogelijk dezelfde sterke emoties op. Hoofdstuk 4 onderzoekt daarom de impact van extreem contextonderzoek op de emoties van en manier van betekenis geven aan de situatie door onderzoekers en pleit voor het gebruik van emoties achteraf, niet alleen als validatiemiddel in de context van reflectie, maar ook als productief element van theorievorming.

Als geheel beoogt dit proefschrift deze perspectieven op informele, minder voor de hand liggende, en zelden onderzochte dynamiek te combineren om wat licht te

werpen op deze onderbelichte maar zeer invloedrijke elementen van het organisatorische leven.

DEUTSCHE ZUSAMMENFASSUNG (SUMMARY IN GERMAN)

Im Lebenszyklus einer Organisation wirken Mechanismen, die über das reine Umsetzen des Organisationsziels hinausgehen. Diese komplexen und informellen Prozesse prägen ein Unternehmen manchmal mehr als seine grundlegenden operativen Prämissen.

Zur Erforschung dieser Mechanismen untersucht diese Dissertation mittels einer systematischen Literaturrecherche (Kapitel 2), wie die Identität einer Organisation und ihre Entstehung die Wertschöpfung in Organisationen beeinflusst. Diesbezügliche Erkenntnisse aus der Forschung werden zu einem multitheoretischen Multi-Ebenen-Modell zusammengeführt, das verdeutlicht wann und wo sich Organisationsidentität manifestiert und welche Rolle sie beim Entstehen und dem Verlust von Wert spielt.

Kapitel 3 untersucht mittels einer Fallstudie die europäische Reaktion auf ankommende Flüchtlinge auf der griechischen Insel Lesbos. Im Mittelpunkt stehen dabei die verborgenen Wirkmechanismen, die in einer hochkomplexen Situation, an der eine Vielzahl von Organisationen und Interessensgruppen beteiligt sind, zum Tragen kommen. Es wird untersucht, wie eine solche lokale Manifestation einer globalen Herausforderung wie der Zwangsvertreibung starke Emotionen auslöst, und wie sich diese Emotionen auf die Sinngebungen und Bewältigungsstrategien der Beteiligten auswirken. Kapitel 3 geht auch auf die Herausforderungen der verschiedenen Gruppen von Beteiligten ein: auf die entstehenden Emotionen, auf die verschiedenen Rollen-Identitäten der Akteure, auf die Art und Weise wie Beteiligte ihre Erlebnisse verarbeiten und welche Methoden der Problemlösung sie entwickeln.

Solche Feldarbeit macht Wissenschaftler zum Teil des Untersuchten und setzt sie möglicherweise ähnlichen Situationen und Emotionen aus. Kapitel 4 untersucht daher die Auswirkungen der Forschung in extremen Kontexten auf die Emotionen und Sinnstiftung der Forscher. Es wird argumentiert, dass Emotionen nicht nur rückwirkend, als Mittel zur Validierung im Zusammenhang von Reflexivität

(„reflexivity“) eingesetzt werden können, sondern auch als Werkzeug zur Theoriebildung.

Als Gesamtwerk zielt diese Dissertation darauf ab, die informellen, weniger offensichtlichen und selten untersuchten Dynamiken, die dennoch sehr einflussreich in und zwischen Organisationen sind, zu beleuchten.

ABOUT THE AUTHOR



Christina Langenbusch was born in Germany and obtained her Diploma as a business graduate and her Master of Arts in International Business Studies from the University of Paderborn in Germany. In 2015, she joined the Department of Business-Society Management of the Rotterdam School of Management, Erasmus University, as a part-time PhD candidate.

Christina has presented her research at top international peer-reviewed conferences and workshops, including the European Group of Organizational Studies Colloquium (EGOS 2017 & 2019), the Organization Studies Workshop (ORS 2018), and the Academy of Management Discoveries Workshop (AMD 2018). Her work is currently under review in top management journals and forthcoming in a book project.

In her research, Christina examines interrelations between organizational identity, culture, and strategy. She focuses on the qualitative analysis of organizational life, particularly emotions in institutions and research processes. She researched at the intersection of global crisis management and sensemaking in the context of the global grand challenge of forced displacement, visiting Lesbos in 2017 and 2018, to shed light on how individuals and organizations cope with global grand challenges.

Christina brings extensive career experience of organizations and culture to her doctoral research. Before starting her PhD, she spent eight years in consulting and business development roles. Since 2017, Christina has worked as an organizational culture consultant and supports organizations in positive development processes.

AUTHOR'S PORTFOLIO

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Peer-reviewed conference proceedings

- Langenbusch, C., Cornelissen, J. P., Jacobs, G., & van der Giessen, M. (2019). Coping with ambivalent emotions: Making sense of the local manifestation of forced displacement. *35th European Group of Organizational Studies (EGOS) Colloquium*. Enlightening the Future: The Challenge for Organizations. Sub-theme 9: Paradoxes of Enlightenment: Enlightenment of Paradoxes. Edinburgh, United Kingdom (July 4-6, 2019).
- Langenbusch, C., Cornelissen, J. P., Jacobs, G., & van der Giessen, M. (2019). Coping with ambivalent emotions: Making sense of the local manifestation of forced displacement. *6th Annual Edinburgh Writing Workshop*. University of Edinburgh Business School, United Kingdom (March 4, 2019).
- Langenbusch, C. & van der Giessen, M. (2018). Lesbos – managing the local manifestation of a global grand challenge: Displacement, disruption and division at Europe's doorstep. *13th Organization Studies (ORS) Workshop*. Responding to Displacement, Disruption, and Division: Organizing for Social and Institutional Change. Samos, Greece (May 24-26, 2018).
- Langenbusch, C. & van der Giessen, M. (2018). Managing the local manifestation of global displacement: The refugee crisis in Lesbos. *Academy of Management Discoveries (AMD) Workshop*. Empirical

Exploration in Management and Organizational Research: Abductive Reasoning. Erasmus University, Rotterdam School of Management, The Netherlands (May 17, 2018).

- Langenbusch, C., Cornelissen, J. P., & Jacobs, G. (2017). Organizational identity and value creation: A systematic review and critical interpretive synthesis. *33rd European Group of Organizational Studies (EGOS) Colloquium*. The Good Organization: Aspirations, Interventions, Struggles. Sub-theme 49: Identity Tensions and Strategizing. Copenhagen Business School, Denmark (July 6-8, 2017).

Workshops and research days

- EGOS Pre-Colloquium PhD Workshop. *35th European Group of Organizational Studies (EGOS) Colloquium*. Enlightening the Future: The Challenge for Organizations. Edinburgh, United Kingdom (July 1-2, 2019).
- Langenbusch, C., Cornelissen, J. P., Jacobs, G., & van der Giessen, M. (2018). European refugee response crisis and its manifestation on Lesbos: Coping with an institutionalized mess. *VU Business & Society Workshop*. University of Amsterdam Business School, The Netherlands (November 19, 2018).
- Langenbusch, C., Cornelissen, J. P., Jacobs, G., & van der Giessen, M. (2018). European refugee response crisis and its manifestation on Lesbos: Coping with an institutionalized mess. *RSM Research Day*. Erasmus University, Rotterdam School of Management, The Netherlands (November 8, 2019).
- EGOS Pre-Colloquium Development Workshop 08: Analyzing Talk-in-Interaction in Organizational and Leadership Studies. *33rd European Group of Organizational Studies (EGOS) Colloquium*. The Good Organization: Aspirations, Interventions, Struggles. Copenhagen Business School, Denmark (July 5, 2017).

- Langenbusch, C., Cornelissen, J. P., & Jacobs, G. (2017). Organizational identity and value creation: A systematic review and critical interpretive synthesis. *RSM Research Day*. Erasmus University, Rotterdam School of Management, The Netherlands (May 9, 2017).

Teaching

- Guest lecturer in Master Program in Imagineering. *Lecture on Organizational identity* at NHTV Breda University of Applied Sciences, The Netherlands, January 25, 2018.
- Guest lecturer in Bachelor Program in International Business Studies. *Lecture on: The founding spirit – the basis of corporate identity* at FHDW Mettmann University of Applied Sciences, Germany, April 24, 2015.

Invited talks

- Lesbos – managing the local manifestation of a global grand challenge. Displacement, disruption and division at Europe's doorstep. *European-University Viadrina Frankfurt (Oder)* Germany, July 19, 2018.
- Hosting parallel workshop at the Working conference on local responses to forced displacement – Facing grand challenges together. *Centre of Excellence in Public Safety Management (CESAM)*. The Netherlands, Rotterdam, March 28, 2019.

RSM PhD Series Research in Management

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Organizational life entails complex, informal processes that can define an organization just as much as its basic operational premises. To investigate these phenomena, this dissertation begins with a systematic literature review that critically investigates how the formation and strength of an organization's identity is associated with value creation, providing a multi-level and multi-theory framework.

It then delves into a case study of the European response to arriving refugees on the Greek island of Lesbos. It explores the hidden mechanisms that are at play in a hyper-complex, multi-level stakeholder setting, investigates how the global grand challenge of forced displacement can trigger deeply felt emotions, and how such emotions impact individuals' sensemaking and coping strategies.

Such fieldwork makes researchers part of the setting, exposing them to the same situations and possibly triggering similar strong emotions. The dissertation therefore also explores the impact of extreme context research on researchers' emotions and sensemaking and argues for not only using emotions retrospectively, as a means of validation in the context of reflexivity, but also as productive components for theory building. As a whole, this dissertation aims to combine these perspectives on informal, less obvious and rarely scrutinized dynamics in order to shed some light onto under-researched but highly influential elements of organizational life.

This PhD thesis has sprung from the Part-time PhD Programme at the Rotterdam School of Management, Erasmus University (RSM). Part-time PhD candidates conduct research against the highest academic standards on topics with real-world application value, thereby contributing to the positive impact of RSM research on business and other societal stakeholders. This programme allows candidates to develop their academic and research skills while they work. During the five-year programme, candidates are trained in research methods, use RSM's research facilities and databases, participate in international conferences, and are supervised by research active faculty.

RSM is one of Europe's top business schools with a strong reputation for academic research. It aims to develop business leaders immersed in international careers, who can become a force for positive change by carrying a critical, creative, caring, and collaborative mindset into a sustainable future.