Organizational Learning: A Conceptualization in the Framework of the Relational Economics Theory

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Synopsis

"Organizational Learning: A Conceptualization in the Framework of the Relational Economics Theory" is a dissertation project conducted as part of the research agenda of the Leadership Excellence Institute Zeppelin (LEIZ) at Zeppelin University (Germany). In particular, this research aims to contribute to the relational economics research agenda (Wieland 2020a; Biggiero et al. 2022).

In 2019, a research exposé was submitted for this PhD thesis. It focused on the transcultural learning model (TLM) (Wieland 2019; Baumann Montecinos et al. 2019). This model is defined as a three-step learning process to identify and develop existing and new cultural commonalities and thus foster cooperation (Baumann Montecinos et al. 2019). From an initial literature review on the transcultural learning model (Wieland 2019; Baumann Montecinos et al. 2019; Baumann Montecinos et al. 2021; Baumann Montecinos 2022), it was found that it has not been conceptualized in relation to organizational learning (OL) theories. This lack of conceptualization in relation to organizational learning therefore constituted the research gap that the study initially sought to address. Against this background, a first initial research question was derived:

> How can transcultural learning be applied in organizations?

As the research progressed, it became clear that the TLM as conceptualized by Wieland (2019) and Baumann Montecinos and associates (2019; 2021; 2022) is part of the research agenda of relational economics theory. If the aim of the research is to explore how the model can be applied in organizations, the first step would be to conceptualize organizational learning in terms of relational economics theory. Therefore, a step back was taken, and a broader research question was derived:

> How can organizational learning be conceptualized in the framework of the relational economics theory?

This question then guided the whole research process and became the main research question for this monograph.

From a methodological perspective, this is conceptual research that responds to the call for more research in relational economics (Biggiero et al. 2022). Throughout the research, it became clear that the conceptualization of organizational learning in the forementioned theoretical framework would require a conceptual and methodological shift compared to the existing literature on organizational learning (see chapter two on the literature review). As presented and discussed in chapters three and four, much of the existing organizational learning literature can be placed within the framework of methodological individualism. This latter implies defining organizational learning in terms of the parts (for instance employees) of the organizational system, which may make organizational learning difficult to distinguish from individual learning within the organization. The emphasis on individuals within organizations is somehow connected to the nature of organization in classical (e.g., Weber 1904/2005; Taylor 1919) and neoclassical (e.g., Mayo 1945; Cyert & March 1963) organizational theories, as discussed in chapter three.

The nature of the organization in the relational economics as a nexus of stakeholders´ resources and interests (Wieland 2020a; 2022 – see discussion in chapter one) has implications for the conceptualization of organizational learning in terms of relational economics. The nature of the organization in relational economics implies a dynamic view of the organization beyond institutional boundaries while defining the organization as an entity in its own right. Entity is related to the noun "organization", which, in the literature, is contraposed to the verb "organizing" (Schoeneborn et al. 2019). Nevertheless, in relational economics, entity does not mean a static view of organization, but is similar to what Schoeneborn et al. (2019) define as "processual entity", which brings together organization as noun and organizing as verb. It brings together process and form (both-and approach) (see discussion in chapter three).

Although there is some consensus that the organization is not just the sum of its employees (see chapter two), in the organizational learning literature some scholars have struggled to make clear the distinction between individual learning and organizational learning by the entity (see the debate in chapters two and three). Yes, there are individuals within organizations and yes they do contribute to organizational learning, but the overemphasis on the role of individuals for organizational learning has somehow obfuscated a conceptualization of organizational learning as learning by the organizational entity. The concept of organization as a nexus of stakeholders' resources and interests would require going beyond organization as a group of internal employees towards a shift to a transactional relation in which stakeholders invest resources and interests. The consequence would be that to conceptualize organizational learning in the framework of relational economics also requires a methodological shift from methodological individualism to methodological relationism (see discussion in chapter four). This shift would then make it possible to view the organization as a processual entity[1].

This research aims to deliver three main academic contributions. First, it aims to propose a new conceptual model of organizational learning to explain it within the framework of relational economics theory, thus contributing to the further development of relational economics theory. Second, the research aims to contribute to the organizational learning literature. In particular, it aims to conceptualize organizational learning as learning by the organizational entity, thereby drawing a distinction between organizational learning and individual learning within the organization. Thirdly, this research also aims to contribute to the further development of the TLM by conceptualizing it as an organizational learning model and by elaborating on the role of communities of practice (CoPs) for the application of the model in organizational contexts (chapters five and six).

In order to achieve the research goals, some conceptual groundwork was required, in particular the following definitions that are used in this research should be clarified:

- Elaboration of the concept of organization within the framework of relational economics theory and its implications for organizational learning (chapter one)

From the nature of organization in relational economics and further elaorations that will be presented in chapter one, the following definition of organizational learning is adopted in this research: Organizational learning is a process for the relationalization of rationalities for enabling the completion of multi-contextual transactions in the context of organizations intended as entities in their own right (see chapter one). The conceptual clarifications in chapter one represent the basis on which further and more specific sub-research questions will be derived: To what extent does existing organizational learning literature support the definition of learning as proposed in this research (sub-research question a); the role of the TLM (sub-research question b) and CoPs (sub-research question c) for the operationalization of organizational learning (see chapter one). After clarifying these conceptual pre-steps, and deriving further

[1] When in the following the term "entity" is used, it will refer to a processual entity, in the sense that it is not intended as a static concept of organization, but organization that emerges, creates and transforms through transactions involving stakeholders that invest resources in the organization.

sub-research questions, the following chapters constitute building blocks for a theoretical conceptualization of organizational learning within relational economics. These conceptual building blocks are:

- Literature review of existing organizational learning theories (chapter two) and the implications for defining learning within relational economics (chapter three)
- Relational re-conceptualization of organizational learning (chapter four)
- Transcultural learning model as a model for the operationalization of relational learning in organizations (chapter five)
- Communities of practice as loci of relational learning and its integration in the model of transcultural learning (chapter six)
- Empirical study to test the concepts elaborated in this research (chapter seven)

Figure 1 shows a representation of the conceptual map of this research.

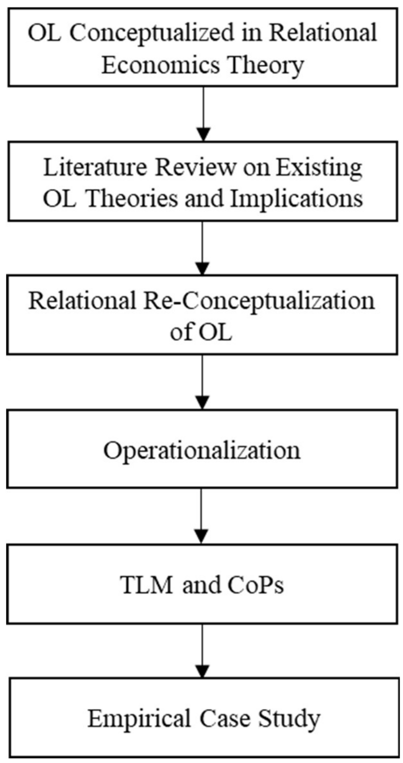

Figure 1: Research Conceptual Map. Source: Own illustration.

Synopsis

To summarize, this thesis is structured as follows: In the first chapter, some basic concepts of relational economics theory relevant to this research are introduced and their implications for organizational learning are discussed. These conceptual foundations provide the basis for the definition of organizational learning proposed in this thesis, namely a process for the relationalization of rationalities for enabling the completion of multi-contextual transactions in the context of organizations intended as entities in their own right. The first chapter concludes by outlining more specific sub-research questions related to the congruence of the proposed definition of organizational learning with definitions in the literature (to what extent do existing organizational learning theories support the definition of organizational learning as proposed in the research at hand), as well as the role of the TLM (how does the transcultural learning model contribute to the operationalization of organizational learning as conceptualized in this thesis) and CoPs (how do CoPs provide the loci for the operationalization) in operationalizing organizational learning as conceptualized in this research. An overview of the methods used (narrative literature review, conceptual analysis and case study) is provided in the conclusion of the first chapter.

Chapter two presents and discusses the narrative literature review of organizational learning based on more than seventy papers. The aim is to present the current state of the art of the existing literature on the topic. The results of the literature review highlight how the existing literature is methodologically individualistic as well as highlighting the distinction between the literature on intra-organizational learning and the literature on inter-organizational learning.

Chapter three discusses the implications of the literature review for the definition of organizational learning within the framework of relational economics. In particular, the following topics are discussed: The impact of individual learning literature on organizational learning, the nature of the organization behind the existing organizational learning literature, the distinction between relational and interpersonal relationships and the impact of these relationships on learning, the triggers and outcomes of organizational learning, the role of culture in existing theories and in relational economics. Chapter three includes a conceptual analysis of the conceptual link between existing definitions of organizational learning and organizational learning as conceptualized in this research, and the conceptual changes required. Chapter three concludes with the argument that the conceptual changes can be summarized in one main change, namely a methodological shift from individualism to relationalism.

This transition from methodological individualism to methodological relationism is then discussed in chapter four. In particular, chapter four first provides an overview of the different metaconstructs (individualism, holism and relationism), focusing on their differences. The second part of the chapter then discusses the implications of applying methodological relationism to organizations and organizational learning. Chapter four concludes by arguing that organizational learning in the meta-construct of methodological relationalism requires a micro-meso relationalization process.

Chapter five focuses on the operationalization of organizational learning as a process of relationalizing rationalities through TLM. In this chapter, TLM is introduced and discussed. The chapter also aims to link TLM to the literature on organizational learning. It also elaborates on the concepts of non-normativity and pro-sociality (which are crucial to TLM but not addressed in the organizational learning literature). Tomasello's shared intentionality (Tomasello 2019) as well as social categorization theory are applied to explore how non-normativity and pro-sociality can be promoted at the organizational level and how they can support the relationalization of rationalities in the organization. Chapter five concludes by highlighting the need for a locus of contact to promote the relationalization of multiple rationalities.

Chapter six introduces and discusses the concept of CoPs as one such locus of contact. A literature review of conceptual and empirical studies of CoPs in organizations is presented to clarify the theoretical framework from which CoPs have emerged. This literature review provides the starting point for a conceptual analysis of the conceptual links between CoPs and TLM and the conceptual changes required to apply CoPs to the operationalization of organizational learning as in this research. The chapter then presents an updated version of TLM at the organizational level. The chapter concludes with some elaborations on the assessment of the success factors of TLM. In particular, the cooperation rents achieved through organizational learning and the relational costs of enabling relational learning are used as variables to evaluate organizational learning.

The empirical application of the concept of organizational learning as elaborated in this research and the updated version of TLM is then tested in a case study (chapter seven). Despite some limitations, the case study provides empirical evidence for the concept of the organization as a nexus of stakeholders´ resources and for the relational view of learning as a micro-meso-relational process in which both the stakeholders who invest in the resources and the organization as a whole can learn.

While the first four chapters deal with the nature of organization and organizational learning, with questions related to what organization is and what is organizational learning (questions that Simpson & den Hond 2022 define as “metaphysical stances”), the last chapters take a pragmatic approach towards organizational learning. This means that through the operationalization of the concept of organizational learning as elaborated in this research through the TLM and CoPs, this research also accepts the call for providing pragmatic contributions to organizational studies (Simpson & den Hond 2022). They are pragmatic because the operationalization and the following empirical case study contribute to understanding the everyday organization in a complex and continuously changing economy and society (Simpson & den Hond 2022; Simpson 2018; Elkjaer & Simpson 2011). In this way, this study aims to contribute both to understanding the nature of organization and organizational learning and their empirical evidence.

Since organizational learning has not yet been conceptualized in the framework of the relational economics theory, this research is of an exploratory nature.

Chapter One

Conceptual Groundwork, Research Questions and Methods

1. Introduction

This chapter lays the conceptual foundations for this research. The concepts of an organization as defined in relational economics (Wieland 2014a; 2020a; 2022) are introduced. The implications of this concept for organizational learning are then discussed. Based on this conceptual foundation, a definition of organizational learning is then derived. This definition will set the premise for the relational re-elaboration of organizational learning presented in the following chapters.

The discussion also lays the foundations for further (sub) research questions. These sub-questions allow the broad research question presented in the introduction (how to conceptualize organizational learning in the framework of the relational rconomics theory?) to be broken down into more specific sub-questions.

The chapter concludes with the presentation of these sub-research questions and methods.

2. Conceptual Groundwork

2.1 Nature of Firm in the Relational Economics Theory

The need for a conceptualization of organizational learning in terms of relational economics arises from the lack of a definition of organizational learning in relational economics theory. Learning theories in general are not central to the current debate in relational economics (see, e.g., the collection of contributions to the relational view of economics in Biggiero et al. 2022, none of them focus explicitly on organizational learning). However, relational economics does address the nature of the firm, which can provide theoretical inputs for the conceptualization of organizational learning in terms of relational economic theory. In the following, the nature of the firm (and in general of organizations) as applied in this research is elucidated to provide a theoretical background to define organizational learning within the framework of relational economics.

The relevance of making clear the nature of organizations in the research at hand derives from the claim that the applied definition of an organization shapes how a phenomenon (in this case organizational learning) is approached (Scott & Davis 2016). According to the relational economics theory (Wieland 2020a; 2022), firms are a nexus of stakeholders´ resources and interests[2]. Figure 2 provides a representation for firms as defined by Wieland (2014a; 2020a).

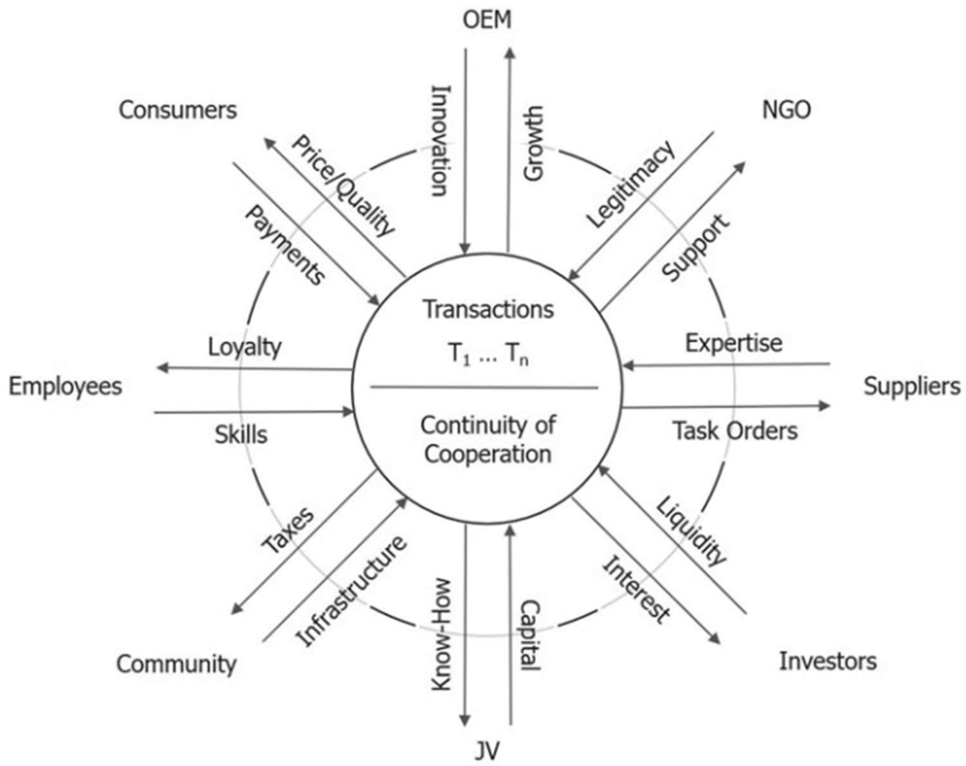

Figure 2: The Firm as a Nexus of Stakeholder Resources and Interests. Source: Wieland (2020a: 71).

[2] On his elaborations on the nature of the firm, Josef Wieland´s theory is placed into the theoretical framework of the theory of the firm. For an overview of some of the most relevant theoretical contributions to the theory of the firm, see Coase (1937), Machlup (1967), Richardson (1972), Alchian & Demsetz (1972), Jensen & Meckling (1976), Pensore (1997), Williamson (2005).

At the centre of the representation of the firm as a nexus of stakeholders there are transactions. The latter is the fundamental unit of analysis for relational economics. The elaborations on transactions in relational economics draw on the debate in the institutional economics literature. In this literature, the concept of the transaction has been intensively discussed and has had a great influence on the theory of the firm. John Rogers Commons (1934) argues that transactions are the smallest unit of institutional economics and that institutions (organizations in this study) are ongoing concerns existing in their transactions. The ongoing concern is held together by working rules, i.e., a governance structure. From this view, the firm exists in its transactions (Commons 1934). It "lives", in the sense that it continues to exist as it reproduces itself in concrete transactions. Scott & Davis (2016) use the metaphor of Lego to explain the transaction view of organization, namely the transaction is like a Lego brick, and the organization emerges while assembling the multiple Lego bricks. Williamson (2005) argues that the firm is a governance structure to economize on transaction costs. From a macro perspective, in the transaction view, the economy is viewed as "a nearly endless series of value chains linking organizations and industries into a network of transactions" (Scott & Davis 2016: 223).

Transactions are performed by the stakeholders who invest their resources in the firm, expecting to earn both factor income and cooperation rents (Wieland 2020a). Factor incomes are agreed in legal contracts (Möhrer 2022). Cooperation rents are rather to be understood as the above-average profit that results from the combination of the different resources that are brought together by the different stakeholders and can be either tangible or intangible (Wieland 2020a; Möhrer 2022). The stakeholders´ resources form a nexus. Such a nexus is formed both by stakeholders within the organizational institutional boundaries (e.g., employees) and outside the organizational institutional boundaries. The latter concerns both inter-organizational links (e.g., suppliers, joint ventures) and extra-organizational links (e.g., NGOs, government, community) (Wieland 2014a; Wieland 2020a; Wieland 2022). OEMs, NGOs, suppliers, investors, joint ventures, communities, workers, consumers and others invest their resources (e.g., liquidity, capital, infrastructures, etc.) in the firm. The stakeholders then "use" the organization to carry out their transactions[3]. The governance structure provided by the organization should therefore be designed to enable cooperative

[3] Rendtorff (2021) interpreted this passage in Wieland´s theory as firms as entities that can be "rented" by stakeholders to conduct transactions.

value creation. In this sense, the organization is a system of relationships (between stakeholders and their resources) (Coase 1937) whose existence is a form of collective action (Commons 1934; Wieland 2014b; Wieland 2020a). This view of organization as a nexus of stakeholders´ resources, as a system of relationship and as a form of collective action, focuses on the portfolio of ties of the organization (Scott & Davis 2016). This view also raises the issue of boundaries since it makes the organizational boundaries blurred. The organization is no longer confined to its institutional and legal boundaries. To identify the organizational boundaries, the nexus of stakeholders who invest resources are to be identified. This implies an open system view of organization (Scott & Davin 2016)[4].

Although in the relational economic theory, the firm is a nexus of stakeholders´ resources and interests, it is an entity in its own right (Wieland 2020a), namely it exists independently of its stakeholders. Stakeholders are "citizens" of the organization (Commons 1934). The latter will live before and after single "citizens" will come and go (ibid.). The organization as an entity is itself a stakeholder of society. While stakeholders are citizens of the organization, the organization is, on the other hand, a citizen of the society (Wieland 2020a; Rendtorff 2021). As a "good" citizen, it should create value for all stakeholders involved in its transactions (ibid.).

The concept of organizations as nexus of stakeholders' resources and interests and entity in its own right may require further elaboration, especially concerning specific types of organizations, like shell companies and individual enterprises. Shell companies exist only on paper. They have no employees, no significant assets and operations (Kristo & Thirion 2018). Although shell companies can be legal (Kristo & Thirion 2018), sometimes they are used for criminal aims such as tax avoidance, corruption, etc. (Rocha-Salazar et al. 2022; Sharman 2010). Individual enterprise refers to self-employment and can be either with or without employees (OECD 2022a; 2022b). The legal definition of individual enterprise can vary in different national legal frameworks but, in general, it refers to individual entrepreneurs that perform economic activities. The nature of organizations as nexus of stakeholders' resources and interests and as entities in their own right may apply to these organizations as well. As for the entity in its

[4] Davis used the metaphor of a bowl of oatmeal to highlight how blurred organizational boundaries are. In particular, he argues that, at least in some sectors, "to distinguish between separate organizations is like trying to separate out distinct lumps in a bowl of oatmeal" (Davis 2005: 480).

own right, these examples of companies are, at least from a legal perspective, separate entities. Indeed, in all the cited examples, the legal entity (legal person) is legally separated from the individual (natural person), and in some cases also the connected responsibilities are kept separated. Anyway, the concept of organization as nexus of stakeholders´ resources may also apply to these organizations. As for individual enterprises, although the economic activities of these enterprises may be conducted by a single entrepreneur, this individual enterprise may still be a nexus of stakeholders´ resources. Indeed, while conducting economic activities, customers may pay for the services and/or products, governments may provide infrastructures in return for taxes, suppliers may supply services and products and the entrepreneur her/himself may invest in the entity her/his finances and skills to obtain an income and will be her/himself a stakeholder of the entity. As for shell companies, the purpose of this type of organization may make it difficult to identify its nexus of stakeholders´ resources and interests, as the scope (at least in some cases) would be to hide resources and interests (for instance, hidden financial resources to avoid paying taxes). Although not visible, there are nevertheless many stakeholders' resources and interests involved. Examples of resources may be financial funds or skills in hiding funds by stakeholders such as clients, banks, brokers etc. The interest may be to get a financial return, to commit criminal acts, etc. Although these are not the type of organization this study is focused on, the concept of organization as a nexus of stakeholders´ resources and interests that form an entity in their own right can find broad application.

One of the most important further contributions of relational economic elaborations to the theoretical debate is the definition of relational transactions and their distinction from exchange transactions (Wieland 2020a). While the latter are dyadic and discrete, a relationship but not relational (Wieland 2020a, Wieland 2022), the former are dynamic attractors of polyvalent events. This means that stakeholders involved in the transaction come from different contexts (polycontextuality), have different logics (polycontexturality) and language games (polylinguality) (ibid.). Polyvalent events are brought into the transaction by multiple stakeholders and should be relationalized to enable ongoing cooperative relations (Wieland 2020a; Wieland 2022). In this context, the term "relational" in relational economics is not limited to interpersonal relationships (Wieland 2020a), but rather refers to:

> "The successful integration of multiple rationalities in an adaptive governance structure for the dynamic processing and development of specific economic transactions" (Wieland 2020a: 9)

Relation in the sense of inter-personal relationship would be a rather reductive view of relationship since, in the current economy and society, relationships take place not only among persons but also among organizations (Scott & Davis 2016). In relational economics, relational means integration of different types of rationalities and is not a synonym for personal relationship. Organization as a nexus of stakeholders then requires governance structures in which multiple rationalities are relationalized for the process and development of specific transactions[5].

2.2 *Implications for Organizational Learning: Drawing a Definition of Organizational Learning as Applied in this Research*

These debates have at least two implications for organizational learning. First, if organizations are entities in their own right, then organizational learning should regard this entity. Single stakeholders who invest resources can learn, but this learning would not be sufficient to define organizational learning. To illustrate this last point, let us consider the case of employees (a type of stakeholder): Although employee learning can influence organizational learning, it alone cannot be defined as organizational learning. This does not mean that single stakeholders do not play a role in the learning process, but this is important to distinguish between the stakeholder learning process (either individuals like employees, or collective actors like other organizations)[6] and the organizational learning process (learning process by the entity). Secondly, if the organization

[5] In his interpretation of the nature of the firm in Wieland´s relational economics, Rendtorff (2021) highlights the cosmopolitan dimension of the firm as a nexus of stakeholders´ resources. It is cosmopolitan because this is a view of the firm that takes into consideration rationalities of different stakeholders involved in the transactions, both regional and international, which reflects the complexity of the operating of firms in the global economy. The firm would be embedded in networks which may include stakeholders from different systems and for creating value these different rationalities are to be relationalized. Josef Wieland has, to the best of my knowledge, never used the term "cosmopolitan" while elaborating on the firm as a nexus of stakeholders.

[6] For the distinction between learning as an individual cognitive process and organizational collective process, see the elaboration in chapter two.

exists in its transactions, and if transactions attract multiple rationalities to be relationalized, then the organization should be able to relationalize these rationalities, thereby being able to continue conducting transactions and ultimately continuing to exist. If organizational learning is intended as a process that permits the organization to keep developing and existing, combining the concept of organization as entity in its own right with the need to relationalize rationalities for conducting transactions to keep developing and existing, organizational learning would be:

> A process for the relationalization of rationalities for enabling the completion of multi-contextual transactions in the context of organizations intended as entities in their own right.

The relationalization of rationalities is a process of pattern and structure formation (Wieland 2022). In the former case, the relationalization of rationalities changes the nature of the transaction and forms temporalized patterns (ibid.). The formation of structure refers instead to the governance structure that enables the stabilization of relationalized rationalities. The organization itself provides the governance structure for transactions to take place. It is the investment of the organization as an entity in its own right in the cooperative project of the firm (Möhrer 2022). Governance structure involves, among other things, policies, procedures and organizational culture, all organizational constructs traditionally explored in the organizational learning literature (see chapter two). In this view, organizational learning would promote what Möhrer (2022) calls the continuous re-organization of existing and new stakeholders´ resources for the benefit of the stakeholders and for the organization as entity. Möhrer (2022) claims that governance structure is an economic resource because it can increase the productivity of the various resources invested. In this sense, the value creation of an organization depends on the suitability of governance structures.

2.3 Firms and Organizations

While Commons (1934) contributed to the institutional economics stream and therefore focused on institutions (in the broadest sense), scholars of the theory of the firm (e.g., Coase 1937; Williamson 2005) focused on firms. The concept of organization is broader. The firm is one type of organization, but not the only one. Organizations can also be non-governmental organizations, trade unions, political parties, to name but a few examples. Organizational scholars have focused their research on specific types of organizations (political parties, factories, firms, etc.) (Scott & Davis 2016). This has resulted in a lack of theoretical generalization of organizational theories beyond the specific type of organization studied by scholars in a specific organizational field (for example, scholars from the theory of the firm have focused on the type of organization firm) (ibid.). Despite this lack of generalization, Scott & Davis (2016) highlighted that different types of organization have some common features: All types of organization have objectives, need resources for their activities, have members, etc. Although the case study presented in chapter seven regards the type of organization "firm" and much of the literature presented and discussed in this thesis regards firms (because much of the existing literature on organizational learning has focused on firms), this research aims to contribute to a generalization in the field of organizational learning. Indeed, the definition of organizational learning as "a process for the relationalizing of rationalities for enabling the completion of multi-contextual transactions in the context of organizations intended as entities in their own right" is not limited to the organizational type "firm", as relationalizing of rationalities to enable the completion of multicontextual transactions can also be carried out in other organizational types.

Although the elaboration within relational economics contributes to the theory of the firm, it also addresses the broader stream of institutional economics and the role of other types of organizations have not been neglected (Wieland 2020a). On this point, Wieland's theory of relational economics, drawing on systems theory (Luhman 1987), identifies different binary codes and modes of communication of different types of organizations operating in different systems (Wieland 2020a) (Figure 3).

The scholar argues that multi-contextual transactions, as the name suggests, take place in a multi-faceted environment of operationally closed, communicatively open and functionally autonomous systems (e.g., market, politics, civil society, etc.) (polycontextuality) (Wieland 2020a). Consequently, different binary codes, intended as different decision logics (polycontexturality) are applied in multi-contextual transactions (Market: payment/no payment; politics: legal/illegal; civil society: common good/ private interest, etc.) (ibid.). Different organizations operate in different systems (firms in the economic system; political parties in politics; NGOs in civil society, etc.) and specialize in distinct guiding differences, intended as different modes of communication (polylinguality) (e.g., firms: earnings/costs; political parties: govern/oppose;

NGO´s: engagement/non-engagement, etc.) (ibid.). The various systems are open and communicate with each other (ibid.). They can interact with and complement each other (ibid.).

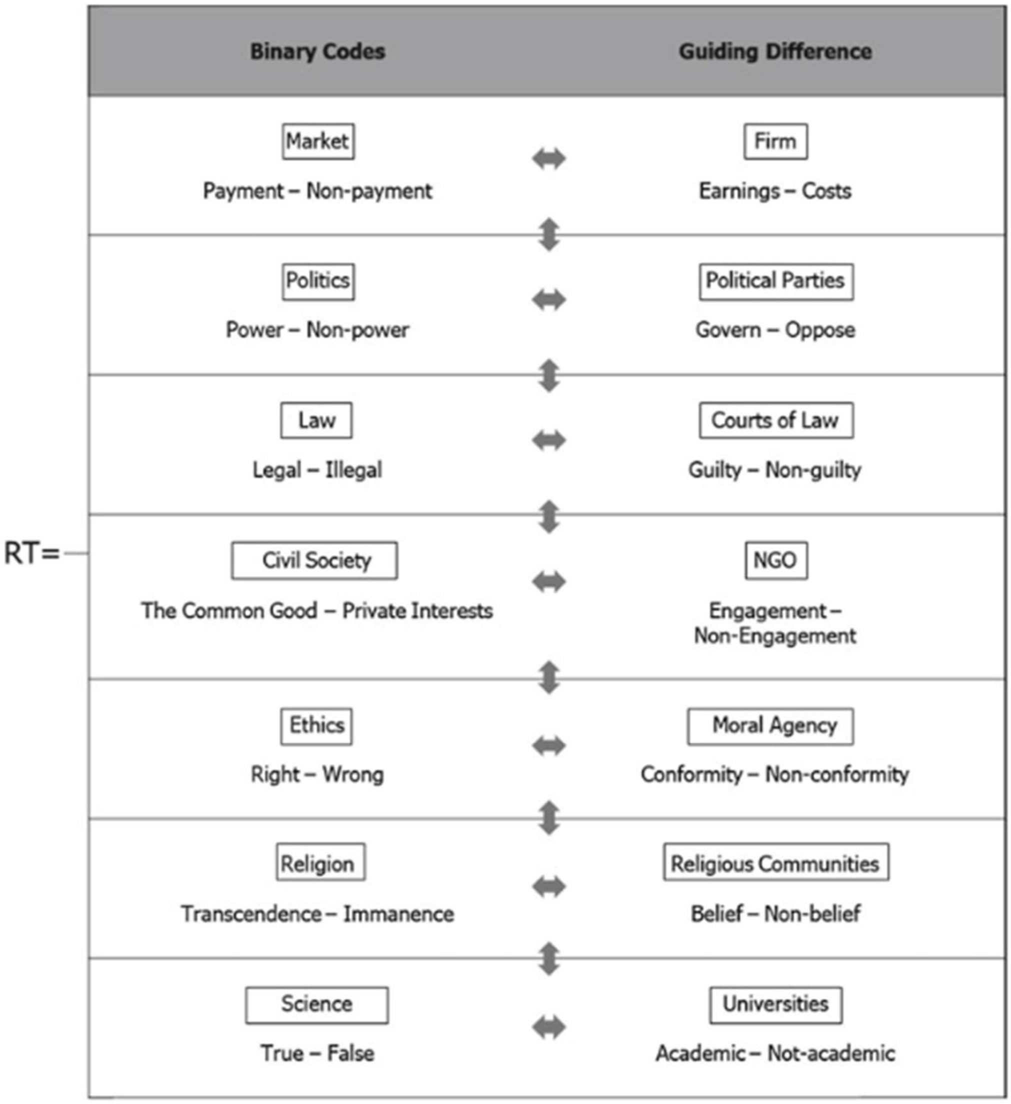

Figure 3: Polycontextural and Polylingual Codes. Source: Wieland (2020a: 58).

The existence of multiple systems provides the theoretical basis for the definition of "relational" in terms of relational economics theory. As discussed earlier, "relational" in relational economics theory refers to the successful integration of multiple rationalities in a governance structure to carry out transactions (ibid.). This means that organizations such as firms (coupled with the market system) can operate in the context of specific multi-contextual transactions and, on a temporary basis, in relation to other systems, such as the law, civil society, etc. (ibid.). This may be the case, for example, when the organizational type “firm” engages in social responsibility projects or when transactions have a legal dimension and therefore integrate different decision-making logics or rationalities (ibid.). If all systems are communicatively open, just as transactions in the organizational form “firm” integrate multiple rationalities, this can also be true for other organizational forms. If this is accepted, then the concept of organizational relational learning as “a process for the relationalizing of rationalities for enabling the completion of multi-contextual transactions in the context of organizations intended as entities in their own right” may apply to organizations broadly conceived.

2.4 Different Organizations, Different Success Criteria of Learning

What might distinguish organizational learning between different organizations would be the success criteria for assessing learning outcomes. Although an organization from a particular system can operate in relation to other systems when carrying out temporal specific multi-contextual transactions and apply the guiding difference of different systems temporally, the organization remains coupled to its system of reference (fims/market; political parties/politics; courts/law, inter alia) and will not adopt the binary coding of other systems (Wieland 2020a).

Type of Organization	**Success Criteria**
Firm	Earnings > Costs
Political parties	To govern
NGOs	Increase in engagement
Religious institutions	Increase in believers
Universities	Increase in academic seminars, publications, conferences

Table 1: Success Criteria of Different Types of Organizations. Source: Own table.

Consider the example of firms (system market; binary code payment/non-payment; guiding difference earnings/cost) and NGOs (system civil society; binary code common good/private interest; guiding difference engagement/non-engagement). Although firms may engage in the context of specific transactions with civil society, as organizations in the system market, they will not adopt the binary code common good/private interest but will remain coupled to the system market and will specialize in the guiding difference earnings/costs (ibid.). Against this background, the success criteria of organizational learning may depend on the guiding difference of the different organizations (see Table 1).

3. Conceptualization of Building Blocks and Methods

The above discussion provides a conceptual clarification of the nature of organization as used in this research. Based on the nature of organizations in relational economics theory (Wieland 2014a, 2020a), a definition of organizational learning was derived (see 2.2 in this chapter). These conceptual foundations and the definition of organizational learning derived from them form the theoretical background on which the conceptualization process of organizational learning within the framework of relational economics is built, necessary for answering the research question presented in the introduction:

> How to conceptualize organizational learning in the framework of relational economics theory?

The answer to this main research question may be facilitated by breaking it down into sub-research questions that may represent conceptual building blocks (Figure 4). The first building block for conceptualizing organizational learning within the framework of relational economics is to summarize the wide range of existing literature on the phenomenon of organizational learning. Such a literature review would allow the current state of the art of the published literature on the topic to be presented (Ferrari 2015; Snyder 2019; Tong & Chan 2022). The literature review provides the foundation for a conceptual analysis. The latter would enable one first to explore conceptual links between organizational learning as defined in this research and as defined in the existing literature. The literature review would also represent the starting point to study the conceptual changes needed to conceptualize organizational learning within the framework of relational economics (Olsthoorn 2017). In particular, this conceptual analysis can identify concepts in the existing literature that should be retained, and others modified to conceptualize organizational learning in the light of relational economics theory.

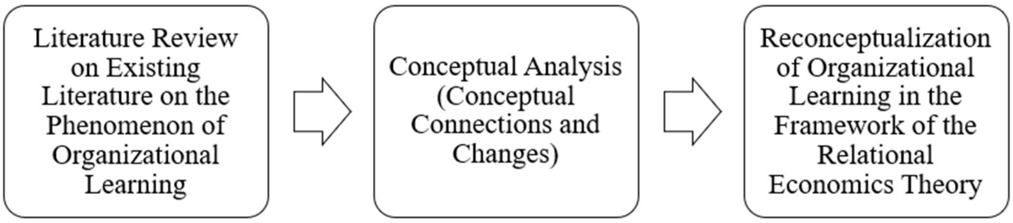

Figure 4: Conceptual Building Blocks. Source: Own illustration.

In the first building block, the following sub-research question was derived:

a. To what extent do existing organizational learning theories support the definition of organizational learning as a process for the relationalizing of rationalities for enabling the completion of multi-contextual transactions in the context of organizations intended as entities in their own right?

This first sub-research question allows one to explore to what extent existing theories support the definition of organizational learning applied here. To answer these research questions, a semi-systematic review (Snyder 2019) was conducted, and the results presented and discussed in chapter two.

In the second building block, the literature review is supplemented by a conceptual analysis. A conceptual analysis aims at elucidating notions, thereby improving the grasp of the notion one seeks to express (Olsthoorn 2017). In this research, the conceptual analysis would be aimed at elucidating the concept of organizational relational learning as expressed in this research. According to Olsthoorn, there are four forms of conceptual analysis (ibid. 154):

1. Finding a definition for a term
2. Hunting for theoretically conceptual distinctions
3. Exploring conceptual connections between different concepts
4. Studying conceptual changes

In this study, the conceptual analysis is based on forms three and four. After identifying possible theoretical overlaps between existing theories and organizational learning as conceptualized in this research (form three), possible conceptual changes are explored. In this sense, the conceptual analysis would aim to explore how organizational learning in the relational economics theory differs from existing theories of organizational learning (form four).

Conceptualizing organizational learning as a process of relationalizing of multiple rationalities for conducting transactions would require elaboration on how relationalization can actually be operationalized in the organizational context. Polyvalent events in the sense of different contexts (polycontextuality), logics (polycontextuality) and language games (polylinguality) result in different social norms. In relational economics theory, these social norms are generalized as cultural events to be relationalized (Wieland 2020a). In this framework, the model of transcultural learning intended as a form of relational governance that can enable relational spaces (see chapter five), will be applied as a theoretical construct for elucidating how the temporalized relationalization of rationalities (pattern formation) can be stabilized in the governance structure (structure formation). Against this background, the following questions constitute the second sub-question of this study:

b. How does the transcultural learning model contribute to the operationalization of the relationalization of rationalities in the organizational context?

To be able to operationalize organizational relational learning through the transcultural learning model, further conceptualization is required. In this context, the concept of communities of practice (CoPs) (Wenger 1998) is linked to the transcultural learning process in the work of Wieland (2020a), Baumann Montecinos and colleagues (Baumann Montecinos et al. 2021; Baumann Montecinos 2022). Communities of practice is a concept developed by Lave and Wenger (1991) within the social learning literature and has been further elaborated and empirically investigated by numerous scholars from different academic backgrounds. CoPs have been studied in their relationship with organizational social capital development (Lesser & Prusak 1999; Lesser & Strock 2001; Urzelai & Puig 2019), leadership development (Smith et al. 2019), innovation (Hao et al. 2017; Pattinson et al. 2016), organizational performance (Kirkman et al. 2013; Lesser & Strock 2001; Wenger & Snyder 2000), knowledge development and management (Retna & Tee Ng 2011; Venkatraman & Venkatramean 2018). Three studies have highlighted the role of communities of practice for transcultural management and learning too (Baumann Montecinos et al. 2021; Baumann Montecinos 2022; Schwengber & Kindlein 2021). Given the theoretical interest in CoPs in the elaborations on transcultural learning, this research also aims to further investigate whether, and how, the concept of CoPs can offer insights for operationalizing organizational learning as relationalization of rationalities. Against this background, a further sub-research question was derived:

c. How do CoPs provide the locus for operationalization of organizational learning intended as the relationalization of multiple rationalities in organizations?

To answer this research question, a conceptual clarification of the concept of CoPs would be a necessary research step. The concept of CoPs will be clarified by a literature review on the concept of CoPs and their empirical application in an organizational context (see chapter six). Just as with theories of organizational learning, conceptual overlaps and changes are presented and discussed to incorporate the concept of CoPs into the conceptualization process. In terms of conceptual links, the concept of communities of practice has been given prominence in the updated version of the transcultural learning model (Baumann Montecinos 2022), but the elaborations have not been accompanied by conceptual elaborations on the conceptual connections between CoPs and transcultural learning. As far as conceptual analysis is concerned, it can be termed constructive conceptual analysis, as the aim of the analysis is to enrich and extend the original conceptual elaborations (Kosterec 2016).

The updated version of the TLM, combined with the conceptual work of chapter two to chapter six, may represent this research's proposition for how organizational learning can be conceptualized within the relational economy framework (third building block). Research questions and sub-questions are summarized in Table 2.

The thesis concludes by presenting and discussing the results of an empirical study conducted in a global player company to support the conceptual argument with empirical data followed by a conclusion. Chapters two, three and four aim to answer sub-research question a., chapter five to answer sub-research question b. and chapter six to answer sub-research question c. Chapter seven is dedicated to the presentation of the empirical study. The research overview, findings, open questions and call for further research is discussed in the conclusions.

Main Research Question	
How can organizational learning be conceptualized in the framework of the relational economics theory?	
Sub-Research Questions	**Methods**
a. To what extent do existing organizational learning theories support the definition of organizational learning as a process for the relationalizing of rationalities for enabling the completion of multi-contextual transactions in the context of organizations intended as entities in their own right?	Literature review (chapter two) + Conceptual analysis (chapter three and four)
b. How does the transcultural learning model contribute to the operationalization of the relationalization of rationalities in the organizational context?	Literature review + Conceptual analysis (chapter five)
c. How do CoPs provide the locus for operationalization of organizational learning intended as the relationalization of multiple rationalities in organizations?	Literature review + Conceptual analysis (chapter six)
Theoretical Framework for Organizational Relational Learning	

Table 2: Research Questions and Methods. Source: Own table.

Chapter Two

Literature Review of Organizational Learning

1. Methodology: Narrative Review

The aim of the review is to present the current state of the art of published literature on the topic of organizational learning. This review is intended to be the first step necessary to answer sub-research question a.:

> To what extent do existing organizational learning theories support the definition of organizational learning as a process for the relationalizing of rationalities for enabling the completion of multi-contextual transactions in the context of organizations intended as entities in their own right?

To answer sub-research question a, this literature review is followed by a conceptual analysis (chapter three). As highlighted in chapter one, this conceptual analysis aims to clarify the conceptual connections and changes between existing organizational learning theories and organizational learning as defined in sub-research question a.

This literature review follows a semi-systematic approach (Snyder 2019), also called a narrative review (Ferrari 2015; Snyder 2019). It is semi-systematic because it aims to provide an overview of the topic of organizational learning and how it has changed over time. This review describes published articles on organizational learning, the general debates, the appraisal of previous studies, current theoretical gaps and trends (Ferrari 2015).

The criterion for selecting the papers was based on the number of citations according to Google Scholar. This criterion was applied to identify the most cited and thus most influential contributions on the topic. The literature review includes reviews, theory and empirical contributions. In the first phase of the review, the following keywords were used to identify the contributions: Organizational learning and inter-organizational learning. In a first step, no time frame was set, so some of the most cited papers were selected, regardless of the date of publication. In a second step, a set of dates was fixed (from 2017 or from

2020) to capture recent literature on the topic. In the third phase, the papers on organizational and inter-organizational learning was integrated with a collection of articles on knowledge management published in the Harvard Business Review. The literature review also includes some of the most frequently cited books on the topic. Only English-language articles were included in the review. In the end, seventy-six contributions were included in the review. To provide an accurate picture of the body of literature, all seventy-six papers explicitly address organizational learning, inter-organizational, learning organization, knowledge creation and knowledge management in organizations. All other papers (although cited in this chapter) have not been included in the list of seventy-six papers (for an overview of the papers, see appendix).

Papers for the literature review on organizational learning	76
Criterion for selecting papers for the literature review	No. of citation in Google Scholar
Types of paper	Review, conceptual and empirical studies
Time-frame	1st Step: No time frame 2nd Step: Papers from 2017
Language	English

Table 3: Methodological Steps for Conducting the Literature Review. Source: Own elaboration.

2. *Fragmented Literature*

The literature review shows that the concept of organizational learning is not clear and unambiguous as it has been influenced by many disciplinary perspectives and ontological issues. In a literature review, Easterby-Smith (1997) identified five disciplines and associated ontologies that have contributed to the literature on organizational learning: Psychology and organizational development, management science, sociology and organizational theory, production management and cultural anthropology (ibid: 1087). Many more sub-streams are identified for each discipline (ibid.). For the discipline of "psychology and organizational development" alone, the researcher identified five strands: human development, cognitive, experiential, learning styles, problems related to difficulties in learning from experience (ibid.:1087ff.).

This fragmentation has been described as a "babylonian confusion of languages" and even an "OL-Jungle" (Klimecki & Laßleben 1998b: 4). Fragmentation in the concept of organizational learning has been widely emphasized and discussed in the literature (for discussions on this point see, e.g., Huber 1991; Dodgson 1993; Crossan et al. 1995; Easterby-Smith 1997; Klimecki & Laßleben 1998b; Popper & Lipshitz 1998; Crossan et al. 1999; Popper & Lipshitz 2000; Easterby-Smith et al. 2000; Bapuji & Crossan 2004; Argote 2011).

As a result of this fragmentation, many different definitions of organizational learning and many models to explain organizational learning processes in organizations have been developed over the years. The following table lists some definitions of organizational learning that have been proposed by different scholars over the years.

Scholar	Definition
Levitt, B., March, J. G. (1988: 319)	"Organizational learning is viewed as routine-based, history-dependent, and target-oriented. Organizations are seen as learning by encoding inferences from history into routines that guide behaviour"
Huber, G. P. (1991: 126)	"An organization learns if any of its units acquires knowledge that it recognizes as potentially useful for the organization"
Cook, S. D., Yanow, D. (1993:378f.)	"Organizational learning, (…), refers to the capacity of an organization to learn how to do what it does, where what it learns is possessed not by individual members of the organization but by the aggregate itself. That is, when a group acquires the know-how associated with its ability to carry out its collective activities, that constitutes organizational learning"
Kim, D. H. (1993: 10)	"Organizational learning is defined as increasing an organization´s capacity to take effective action"
Argyris, C. (1995: 20)	"Learning occurs whenever errors are detected and corrected, or when a match between intentions and consequences is produced for the first time"
Klimecki, R, Laßleben, H. (1998b: 29)	"Organizations learn by observing differences. (…) Organizations observe differences by drawing distinctions"
Crossan et al. (1999: 522)	"Organizational learning can be conceived as a principal means of achieving the strategic renewal of an enterprise"

Holmqvist (2003: 98)	“We may define organizational learning as the social production of organizational rules based on experience that leads to a changed organizational behaviour”
Singh (2011: 357)	“Organizational learning may be considered as long-term activities that build competitive advantages over time and requires sustained management attention, commitment, and effort”
Jiménez-Jiménez & Sanz-Valle (2011: 409)	“Organizational learning is the process by which the firm develops new knowledge and insights from the common experiences of people in the organization, and has the potential to influence behaviours and improve the firm´s capabilities”
Argote & Miron-Spektor (2011: 124)	“Organizational learning is a change in the organization that occurs as the organization acquires experience”
Brix (2017: 117)	“Organizational learning is the process of creating new knowledge for strategic renewal and disseminating it to where it is relevant so that it can be used, reworked or rejected”.
Liu (2018: 258)	“Organizational learning (e.g., exploitative learning and explorative learning) is the critical mechanism linking the relationship between social capital and knowledge transfer”
Zhu et al. (2018: 213)	“Organizational learning is a process of acquiring, disseminating, interpreting, using and storing information within the organizations, leading to new knowledge or insights that affect organizational strategies”
Nyman (2019: 334)	“Learning involves both cognitive processes as sense making by the individuals, and processes of actions as new policies or procedures on the organizational level by new behaviour at team and individual level”
Tortorella et al. (2020: 290)	“Learning at an organizational level is represented by the way a company creates systems to capture and share learning, empowers individuals into a collective vision and direction, connects organization and its environment, and provide strategic leadership for learning”

Table 4: Definitions of Organizational Learning Proposed Over the Years by Different Scholars. Source: Own table.

This fragmentation of the literature is also characterized by conceptual debates, such as the distinction between organizational learning and learning organization and the relationship between organizational learning and organizational knowledge creation and management. The former, namely the distinction between organizational learning and learning organization, dominated the literature until the early 2000s, only to die off thereafter (Easterby-Smith et al. 2000). Both concepts overlap in a sense. The learning organization has been defined as the applied domain of organizational learning (Easterby-Smith 1997), which refers to structures and strategies for maximizing organizational learning (Dodgson 1993: 377). Following the same path, Popper and Lipshitz define the learning organization as “organizations that embed institutionalized learning mechanisms within a learning culture” (2000: 181). Learning organizations thus represent the pragmatic aspect of the more theoretical concept of organizational learning but in a sense, as Popper and Lipshitz point out, they are twin concepts (2000: 182).

The debate on the relationship between organizational learning and organizational knowledge creation and management has similar characteristics. They are also seen as distinct areas of research, but as with learning organizations, knowledge creation and management is in some ways intertwined with the concept of organizational learning. Indeed, organizational learning can be viewed as a process of knowledge creation (see Shrivastava 1983; Paavola & Hakkaarainen 2005; Hong & Sullivan 2009; Brix 2017) or as “an act of acquiring knowledge” (Cook & Yanow 1993: 378). Recent studies (e.g., Brix 2017; Liu 2018) have brought both terms together in a comprehensive framework. Against this backdrop, this literature review also considers scholars traditionally assigned to the knowledge creation and management and learning organization streams.

Fragmentation in the literature also regards the distinction between organizational and inter-organizational learning (Crossan et al. 1995; Beeby & Booth 2000; Holmqvist 2003). Both types of learning have emerged in the literature as two alternative streams. Therefore, in order to provide an accurate overview of the literature, the chapter is divided into two parts:

- Part I: Intra-Organizational Learning
- Part II: Inter-Organizational Learning

3. Part I: Intra-Organizational Learning

3.1 Short Chronological and Thematic Literature Overview

From a chronological perspective, the first study on organizational learning identified in the present review is that conducted by Wright (1936). In this study, Wright published his work on the Experience Learning Curve Model, a mathematical model to explain learning in organizations. Wright derived this model as a result of his empirical research in the aviation sector, where he found that organizations learn through the experience they gain by repeating the same tasks. Wright's study is still influential in the literature, especially in the empirical field of organizational learning (e.g., Anzanello & Fogliatto 2011).

After the initial conceptualization, organizational learning became a field of research in its own right. Apart from learning curves, the literature on organizational learning has been enriched by multiple perspectives over the years. These perspectives include experiential learning (e.g., Kolb & Kolb 2009), action learning (e.g., Argyris 1995; Argyris & Schön 1997), congenital learning (e.g., Huber 1991; Bruneel et al. 2010), social learning (Wenger et al. 2002), systems thinking (Senge 2006), to name just a few examples. In the 1970s, 1980s and 1990s, the literature on organizational learning was populated by diverse contributions. In particular, from the 1980s onwards, there was an “explosion” of contributions on the subject (Easterby-Smith et al. 2000), with exponential growth from the 1990s onwards (Beeby & Booth 2000; Bapuji & Crossan 2004). Relevant contributions such as Argyris and Schön's (1978) distinction between single- and double-loop learning, depending on whether the learning leads to a change in values, strategies or policies; Shrivitava's organizational learning systems (1983); Levitt & March's behavioural theory of organizational learning (1988); March's elaboration on exploration and exploitation in organizational learning (1991); Huber's literature review (1991), which led to the identification of constructs and processes as well as sub-constructs and sub-processes related to organizational learning; Cook and Yanow's cultural perspective on organizational learning (1993); Schein's elaboration on the role of professional sub-cultures in organizational learning (1996) date from this period. This period also saw the development of a multiplicity of models of organizational learning, such as the Interpretation System Model (Daft & Weick 1984), the Mutual Learning Model (March 1991), Nonaka and Hirotaka´s SECI Model (1995), the OADI-SMM (Kim 1993) and the 4I framework (Crossan et al. 1999). These years can be considered to be the golden age for the organizational learning literature.

The beginning of the new century was marked by contributions that aimed to “create order”. This “order” was intended to overcome the conceptual confusion surrounding the term “organizational learning”, to bring together the various contributions and thus consolidate the literature on organizational learning (e.g., Popper & Lipshitz 2000; Easterby-Smith 2000; Bapuji & Crossan 2004; Argote 2011).

Currently, topics such as learning in networks and supply chains and global projects (Gibb et al. 2017; Zhu et al. 2018; Binder 2019; Wiewora et al. 2020; Carmeli et al. 2021), collective and relational approaches to organizational learning (Liu 2018; Nyman 2019; Thygeson et al. 2021) and the role of new information technologies (Barao et al. 2017; Tortorella et al. 2020) have gained relevance in the literature. In general, the current contributions bring an increased awareness of dispersed knowledge and thus of learning processes that take place in intra- and inter-organizational networks. For example, contributions dealing with IT provide insights into how dispersed knowledge from heterogeneous actors can be connected. In this context, Barao et al. (2017) emphasize the role of organizational knowledge architecture in supporting collaboration, socialization, knowledge sharing and coordination of geographically dispersed knowledge to foster the creation of a shared organizational knowledge base. Tortorella et al. (2000) investigated the impact of industry 4.0 technologies on organizational learning and found a positive correlation between the two concepts in an empirical study. Against this background, four chronological stages can be identified in the organizational learning literature (Figure 5):

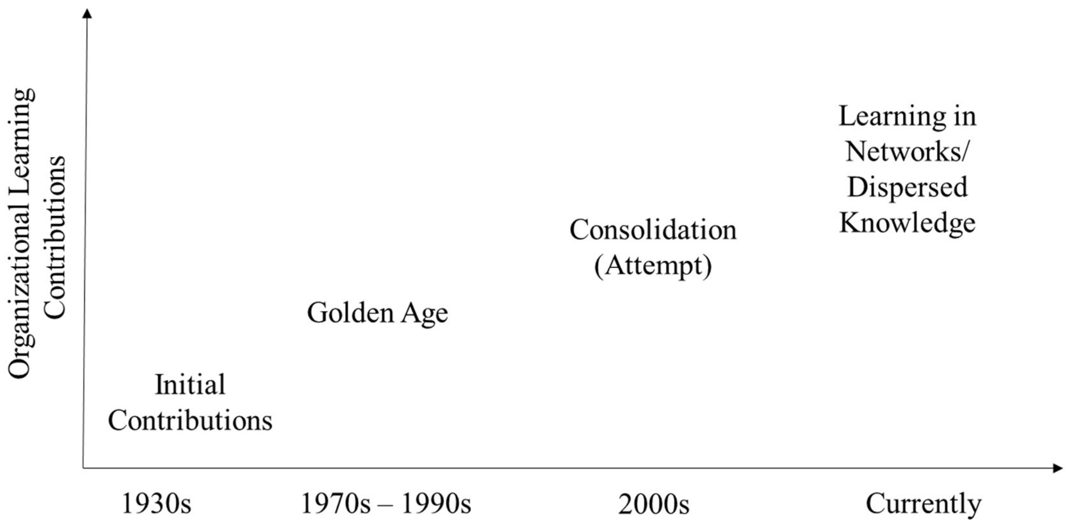

Figure 5: Stages of the Organizational Learning Literature. Source: Own illustration.

3.2 Individual Learning or Organizational Learning?

Throughout the chronological phases of the development of the literature on organizational learning, particularly from the 1970s to the 1990s, the intertwining of psychology, individual learning and organizational learning has played an important role. As will be discussed below, many of the most notable contributions to organizational learning have been influenced by individual learning theories, particularly the cognitive, behavioural, experiential and social approaches (Cook & Yanow 1993; Klimecki & Laßleben 1998b; to cite but a few examples). Most of these contributions emphasize the role of the individual in the organizational learning process. One of the most cited quotes in the organizational learning literature is: “All learning takes place in people's minds” (Simon 1991: 125). Along the same path, Kim (1993) argues that individual learning is essential to understanding organizational learning and that in the early stages of an organization´s life, organizational learning coincides with individual learning. Only as the organization develops does the difference between the two concepts change (ibid.). The scholar describes organizational learning as individual learning that is transferred to the organization through shared mental models (ibid.). As for Argyris´ (1995) action theory of organizational learning, the behavioural approach has strongly influenced the scholar's elaboration of organizational learning. As for the role of individuals in such a process, the scholar considers individuals as key to organizational learning and emphasizes a “high degree of interdependence” between individual and organizational learning (Argyris 1995: 25). This link between individual and organizational learning is also highlighted in the essay “teaching smart people how to learn” (Argyris 1991), which emphasizes the ability of individuals to connect and work within the organization and with organizational stakeholders. Management, according to the scholar, should guide and integrate the work of skilled employees (ibid.). This interdependence is also extensively documented in the work of other scholars. For example, March states that “organizational knowledge and faiths are diffused to individuals (…) simultaneously, the organizational code is adapting to individual beliefs” (March 1991: 74). Dodgson argues that “individuals are the primary learning entity in firms” (1993: 377). Nonaka states that “new knowledge always begins with the individual” (1998: 26) and coherently argues that the organizational knowledge creation process belongs to the human resource strategy (ibid.).

To this stream on organizational and individual learning can also be counted the theories of organizational learning, which are based on theories of experiential and social learning. Both originated conceptually as individual learning theories (on experiential learning see Dewey 1938; Kolb 1984 and on social learning see Bandura 1971) and were then extended to organizational learning. As far as experiential learning is concerned, Kolb & Kolb (2009), for example, have developed the Experiential Learning Cycle which, although not exclusively developed as a model for organizational learning, can, according to the authors, also be applied in organizational contexts (Kolb & Kolb 2009). On the other hand, social learning theories form the theoretical basis for communities of practice, a concept that has influenced a stream in the organizational learning literature (see chapter six on CoPs).

Although many of these works see organizational learning as an organizational process, individuals play the role of agents[7] (Shrivastava 1983), mediators of organizational learning (Popper & Lipshitz 2000), in the sense that learning takes place through members of the organization but must also somehow be encoded in the organization. Similarly, Holmqvist argues that organizational practitioners learn "on behalf of the organization" (2003: 98). In this sense individual learning would be a necessary but not sufficient condition because, for organizational learning, knowledge should be encoded in a "sopra-individual repository" (Argote & Miron-Spektor 2011: 1126). From an input/output perspective, the input of learning would be individual, the output collective organizational knowledge (Beeby & Booth 2000). The focus on routines and ecologies of learning is, according to Levitt & March (1988), what distinguishes organizational learning from individual learning. Similarly, Holmqvist (2003) argues that the formality and the political and organized side of the process is what distinguishes individual from organizational learning.

Edmondson and Moingeon (1998), in their categorization of organizational learning research, identify two primary units of analysis in organizational learning research, namely individuals and organization. The matrix presented by the researchers distinguishes four domains (quadrants) depending on the unit of analysis (organization or individual) and the research objective (descriptive and intervention). The description attributed to quadrant three, formed by the combination organization and intervention, is "organizational improvement gained through intelligent activity of individual members" (Edmondson & Moingeon 1998: 23). The improvement is organizational, but the process is

[7] This view of individuals as agents of organizational learning is based on individualism as a meta-theoretical basis that treats the collective as the results of individual agents (Ritzer & Gindoff 1993).

through individuals. The emphasis is on the intelligent activity of individual members. From this study it emerged that even when the unit of analysis of organizational learning studies is the organization, the organizational learning process focuses on individuals.

The influence of individual learning theories on organizational learning is also reflected in the models of organizational learning. The interpretive system model, for example, is based on several assumptions (Daft & Weick 1984: 286 f.):

- Organizations are open social systems. Organizational learning consists of processing and interpreting information from the environment. Learning occurs when action is taken.
- Although an organization´s knowledge, behaviours, mental maps, norms and values exist independently from its individuals, organizations do not have mechanisms separate from individuals to set goals, process information or perceive the environment.
- Information interpretation (central for organizational learning in Daft and Weick´s model) occurs at a strategic level.
- Different organizations interpret information from the environment differently.

Daft & Weick's (1984) model takes a behavioural approach to organizational learning and defines learning as a top-down approach. Although it recognizes that the organization is different from its individuals, it assigns the "task" of learning to a few individuals in the organization (top management). Organizational learning (interpretation of environmental information and action) is highly dependent on cognitive individual processes of a few members.

Another relevant model in the literature is the 4 I framework by Crossan et al. (1999). This model explains organizational learning as a process that starts with the individual, reaches the group (collective dimension) and finally the organizations (ibid.). Accordingly, the intuition and interpretations of the individual (the first two I's in the 4-I model) would not be sufficient. The organizational learning process also requires integration (third I) in the group. In this transition, shared understanding is crucial. The process is complete when the organizational level is reached through institutionalization (fourth I). Although Crossan et al.´s model (ibid.) emphasizes the role of individuals in the learning process, it also aims to distinguish the individual process from the organizational learning process. To distinguish individual from organizational processes, the authors argue that organizational learning is multi-level (ibid.).

This influence of individual learning theories on organizational learning literature can be divided into two main streams (Cook & Yanow 1993):

1. Scholars that focus on how individuals learn in the context of the organization
2. Scholars that treat organizations as if they were individuals and use individual learning as model for organizational learning

Cook and Yanow (1993) criticize the individual learning perspective on organizational learning, particularly the cognitive and behavioural approaches, both in the case where the focus is on individuals learning in organizations (first approach to linking individual learning with theories of organizational learning) and in the case where individual learning theories are applied to explain organizational learning (second approach to linking individual learning with theories of organizational learning). The researchers base their criticism on the conceptual difficulties in applying cognitive and behavioural learning approaches to organizational learning. They state that the fundamental conceptual question is not whether individual learning processes take place in organizations and whether this learning has a positive impact on organizational processes. In fact, individuals learn in the organization and this learning can have a positive impact on organizational functioning. It is rather an ontological question related to the nature of organizational learning itself and whether this learning in the organization can be defined as organizational learning (critique of the first approach) and whether organizations learn in the same way as individuals do (critique of the second approach). Further limitations of defining organizational learning as individual learning in the organization (first criticism) have been highlighted in the literature. For example, Crossan et al. (1995) point out that individual learning in organizations does not mean that the organization learns since, for organizational learning, information should be shared and common meanings developed. Furthermore, they emphasize that “if organizational learning is important to the co-operative system, it cannot be purely individual. It must affect the co-operative system in significant ways” (Crossan et al. 1995: 347). This view is also supported by recent literature. For example, Brix (2017) points out that individual learning in the context of organizations does not necessarily lead to organizational learning. In an empirical study by Tortorella et al. (2020), it was found that individual learning does not have a relevant impact on organizational operational performance, whereas organizational-level learning does. If individual learning in the context of organizations does not automatically lead to organizational learning and performance improvement, then perspectives that focus on individual learning in organizations are insufficient to explain organizational learning. As for the second criticism (applying individual learning theories to explain organizational learning as if organizations learn like individuals), Crossan et al. (1995) point out the danger of anthropomorphizing, i.e., applying human characteristics such as memory, cognitive systems, behaviours, etc. to the inanimate organization.

To overcome such difficulties, Cook and Yanow (1993) argue that organizations should be viewed as cultural rather than cognitive entities and propose the cultural perspective on organizational learning. This approach proposes to view organizations as a collective endeavour and to focus on the collective action of organizational members:

> "Over the time and in the course of joint action or practice, a group of people create a set of inter-subjective meanings that are expressed in and through their artifacts (…). Through such "artifactual interations", shared meanings are continually maintained or modified." (Cook & Yanow 1993: 379)

At the end the scholars recognize that it is always about the activities of individuals, but they look at the individual activities from a different angle: The cognitive and the behavioural perspective focus on individual actions, on what happens in the minds of individuals - methodological individualism (Hodgson 2007; Heath 2020). The cultural perspective focuses on the relational process within the organization - methodological relationalism (Kivinen & Piiroinen 2006; Endress 2011; Overton 2013; Subasi 2020; Ho & Chiu 1998; Bunge 2000; Ritzer & Gindoff 1992; Selg et al. 2022; Selg & Vetsel 2020; Emirbayer 1997)). In the latter, knowledge and learning is neither individual nor the simple sum of individual knowledge, but knowledge "in congregate" (Cook & Yanow 1993: 384). Similarly, Engeström and Kerosue (2007) describe the concepts of cultural-historical activity theory aimed at expanding learning "beyond the skin of the individual, to examine collectives and organizations as learners" (ibid.: 337). This is not to argue that individuals do not play a role in the learning process, but rather to distinguish between what individuals learn in the organization (individual cognitive process) and the organizational learning process (relational process)[8].The cultural approach to organizational learning shares some commonalities with the social approach in that both emphasize

[8] Morandin et al. (2021) point out that the literature ignores the social aspect in favour of an individual dimension.

relations. The emphasis is on relational endeavour rather than cognitive and behavioural change[9].

Popper & Lipshitz (1998) followed Cook & Yanow's (1993) call for alternative models to define organizational learning. Against this background, Popper & Lipshitz (1998) discussed in detail the problem of anthropomorphizing organizations and the paradox of organizational learning, namely that an organization is not a mere collection of individuals, but there is no organization without such a collection. Similarly, organizational learning is not individual; it learns through its individuals. To this end, researchers have addressed the following research question:

> Can organizational learning be treated as an extension of individual learning? (Popper & Lipshitz 1998: 163)

The scholars proposed three different answers to such a question:

1. Qualified yes: This answer would be based on two presumptions. First, to treat organizational learning as an extension of individual learning, organizations may have cognitive systems like individuals. Second, organizational learning is mediated by individuals.
2. Implied yes: This answer would treat organizations as if they were individuals and attribute behaviours or features characteristics of human beings. Organizational learning would then be an extension of individual learning.
3. No: This answer could be supported by three possible reasoning processes. First, unlike individuals, organizations are incapable of learning (learning is a human feature). Thus, there is no organizational learning. Second, organizations are capable of learning, but individual learning and organizational learning differ fundamentally. Thus, individual and organizational learning require different conceptualizations. Third, organizations and individuals often know different things.

In the end, the scholars came to two conclusions. First, organizational learning is a metaphor. The definition of organizational learning as a metaphor

[9] Some scholars argue that learning and cognitive development is a social process in its nature and therefore do not distinguish the cognitive from the social development. For an overview of this perspective, please see Schutt (2015), Pescosolido (2015), Henrich (2004), Vygotsky (1978), Salomon & Perkins (1998), Mead (1934).

was also proposed before the work of Popper & Lipshitz (e.g., by Kim 1993 and Dodgson 1993). In a subsequent paper, Lipshitz et al. (2002) argue that it is a “helpful heuristic” to treat organizations as if they were (metaphorical) human beings (ibid.: 82). The second conclusion reached by Popper & Lipshitz in 1998 is that to solve the problem of anthropomorphism and the paradox of organizational learning, it is necessary to distinguish between learning in organizations and learning by organizations. The researchers then proposed to distinguish between the structural aspect of learning (learning mechanisms) and the normative aspect of organizational learning (learning culture) in order to bring together purely structural and purely interpersonal approaches to organizational learning (ibid.).

Both Cook & Yanow´s elaboration on the cultural approach to organizational learning and Popper & Lipshitz’s distinction between learning in organizations and learning by organizations aimed at overcoming the paradox of organizational learning and anthropomorphism. Apart from these contributions, from the 1990s onwards, the cognitive and behavioural approaches to organizational learning were complemented by social approaches, which gained prominence in the literature (Easterby et al. 2000). Important contributions in this direction included the concept of “learning-in-working” (Brown and Duguid 1991), “communities of practice” (Wenger 1998), “learning in practices” (Orlikowski 2002) and Cook and Brown´s (1999) distinction between organizational knowledge and organizational knowing based on two different epistemologies, namely epistemology of possession and epistemology of practices. In these contributions, the purely cognitive dimension of organizational learning has been complemented by a collective and social view of learning in organizations. The organizational learning process is described as a collective endeavour and the focus is shifted from human cognition to collective learning. The role of the learning context has become more important, as has the role of shared goals, common ground and mutual understanding. For example, Wiewoira et al. (2020) emphasize the role of CoPs, networks and subsidiaries in organizational learning. Liu (2018) highlights the importance of shared values and collective goals for interaction, learning and cultural and creative innovation. Specifically, he argues that collective goals and shared values foster a willingness to interact and share (ibid.).

The social turn in the organizational learning literature was further reinforced by many contributions that began to link the organizational learning literature to Nahapiet & Ghoshal's (1998) definition of social capital, which is defined as follows:

> "The sum of the actual and potential resources embedded within, available through, and derived from the network of relationships possessed by an individual or social unit. Social capital thus comprises both the network and the assets that may be mobilized through that network." (Nahapiet & Ghoshal 1998: 243)

The scholars propose the division of social capital into three dimensions: Structural (network ties, network configurations and organization); cognitive (shared codes, shared language, shared narratives)[10]; relational (trust, norms, obligations, identification) (ibid.). Some examples of the influence of social capital in the organizational learning literature include Liu (2018), who integrates social capital theory, organizational learning theory and knowledge management and finds that social capital acts as a catalyst for organizational learning in his empirical study of the creative industries (ibid.). In particular, the findings highlight the role of cognitive capital in developing a shared vision, collective goals and mission (ibid.: 267). Barao et al. (2017) also highlight the importance of capturing intellectual capital through knowledge management systems for organizational learning.

The prominence of the influence of social learning approaches towards organizational learning in recent decades does not mean that cognitive and behavioral theories died out. Social, cognitive and behavioral approaches rather co-exist. For example, a recent contribution by Levinthal & Rerup (2021) elaborates on aspiration-based learning (which on the other hand draws on the behavioral theory of the firm) as an organizational learning process for managing ambiguity.

Elkjaer (2003) distinguishes between the cognitive/behavioral and the social approach towards organizational learning as two metaphors of learning. The first approach based on the cognitive/behavioral definition of organizational learning is defined as "acquisition metaphor" (ibid.). This is an approach towards organizational learning that emphasizes the role of individuals, who acquire skills, information and knowledge. The second approach based on the social definition of organizational learning is defined as "participation metaphor" (ibid.). This latter includes the elaborations on CoPs, situated learning and all other contributions from the literature that define learning as a social process of participation. Drawing on the work of Dewey, Elkjaer (ibid.) proposes a third

[10] Note that although Nahapiet & Ghoshal used the term "cognitive", they attribute a social dimension to it: Shared codes, languages and narratives.

way for viewing organizational learning that composes both metaphors and is based on the definition of organization as social world. In this way, the scholar attempted to bridge both streams in the literature.

3.3 Distinguishing the Cultural Approach to Organizational Learning from the Role of Culture in Organizational Learning

At this point it is important to distinguish the cultural approach to learning (proposed by Cook & Yanow 1993) from the role of culture in the learning process. The former refers to the way learning is approached in organizational contexts. The cultural approach to organizational learning can involve both homogeneous and heterogeneous actors. When culturally heterogeneous actors are involved, culture influences the learning process. In this case, culture can play a role in the cultural approach to learning.

On this point, the literature provides some evidence that organizations cannot be considered as completely homogeneous entities. Schein (1996), for example, draws attention to the role of professional organizational sub-cultures and the impact of these sub-cultures on organizational learning. The scholar identifies three main professional sub-cultures in organizations, namely operator, engineering and executive culture and argues that sub-cultures have different shared assumptions and shared meanings (ibid.). He gives the example of the word “marketing” and shows how its meaning can vary according to professional culture: For engineers “product development”, for product managers “market research”, for the salesperson “merchandise” and for the manufacturing manager “change in the product design” (Schein 1996: 12). If one assumes that organizations are, by definition, heterogeneous entities, in the sense that they may contain multiple sub-cultures in terms of professional sub-cultures, national sub-cultures (in the case of geographically dispersed organizations), generations, genders, inter alia, then a cultural approach to organizational learning would also be influenced by culture and would require cooperation between such cultures as a pre-requisite:

> “Once we abandon or reject the assumption that organizations are homogeneous and functional units, we are left with the exciting and challenging task of making sense of, and describing, the work necessary for sustaining the process of collaboration.” (Easterby-Smith et al. 2000: 791)

The influence of culture on the learning process can be controversial. Schein (1996) draws attention to the differences in assumptions and meanings of different cultures that can hinder communication and collaboration. He focuses on the different professional sub-cultures and sees the lack of alignment between these sub-cultures as the main obstacle to organizational learning, which portrays cultural diversity as a barrier to learning. This is not to say that organizational learning cannot take place in a culturally heterogeneous context, but that diversity should be managed productively. To turn the hurdle into a resource, Schein (ibid.) pointed to the importance of alignment, which should not be understood as the domination of one culture over others, but as mutual understanding. Such mutual understanding, according to the scholar, may require communication within the organization to create awareness of different languages and assumptions:

> "Until executives, engineers, and operators discover that they use different languages and make different assumptions about what is important, and until they learn to treat the other cultures as valid and normal, organizational learning will continue to fall." (Schein 1996: 18)[11]

According to Schein, this can be facilitated through "cross-cultural dialogues" (1996: 19). Schein was not alone in reinforcing the role of dialogue, as there is a broad consensus in the literature on the importance of dialogue for organizational learning (e.g., Senge 2006; Beeby & Booth 2000; Easterby-Smith et al. 2000).

Bapuji and Crossan (2004) also emphasize that culture can either facilitate or hinder learning, pointing to the risk of conflicts that hinder consensus, the discovery and development of common ground, and learning. This fragile balance between diversity as a resource and as an obstacle is also highlighted by Leonard and Straus (1998). The scholars also emphasize that diversity can also lead to disagreement and call for "creative abrasion" (1998: 111). They point out the importance of being aware, in the context of collaboration, of why two or more actors are working together (their commonalities), of acknowledging

[11] Schein highlights the relevance of awareness of diversity, the necessity to avoid judging diversity as inferior, but accepting it as valid (diverse but valid), which could be intended as non-normativity (a pre-requisite of the TLM discussed in chapter five). Another point highlighted is the role of place where cross-cultural dialogues can occur. The paper nevertheless does not provide further elaborations, leaving a gap. Chapter six will elaborate on CoPs as loci for relational learning in organizations.

differences, of not judging each other's perspectives as inferior and of understanding each other´s preferences for collaboration, and summarize:

> “Understanding that someone views a problem differently does not mean you will agree. But an important element in understanding thinking styles is recognizing that no one style is inherently better than another. Each style brings a uniquely valuable perspective to the process of innovation, just as each style has some negatives associated with it.” (Leonard & Straus 1998: 128)

Further contributions on the role of culture in organizational learning focus mainly on the role of different perspectives in promoting organizational learning and the relationship between diversity and other variables such as innovation and performance (e.g., Senge 2006; Nonaka 1998; Wenger et al. 2002). Senge (2006) focuses on the interconnectedness of the world and the opportunities for mutual learning in such a networked reality. He also presents a variety of successful examples of organizational learning in multicultural contexts. Other scholars, such as Nonaka et al. (1998), also emphasize the role of different perspectives in the knowledge-building process in organizations. Kirkman et al. (2013), for example, have found a positive relationship between diversity and performance.

Besides cultural diversity in organizations, there is another concept that influences organizational learning, namely organizational culture. While cultural diversity is about the culture of organizational members, organizational culture is about the culture of the organization itself. In terms of the interconnectedness between the two concepts, the degree of diversity in an organization can influence organizational culture. On the other hand, an organizational culture that is open to diversity can influence the degree of organizational diversity. Just as the culture of organizational members can influence organizational learning, organizational culture also affects learning. Lipshitz et al. (2002) include the facet of organizational culture in their multi-faceted model of organizational learning. In this case, the researchers identify five organizational norms to promote organizational learning: Transparency, integrity, issue orientation, inquiry and accountability (ibid: 85ff). These norms, if presented, are a manifestation of organizational shared values (ibid.). Lipshitz et al. (2002) also point out that the normative specification of values does not imply the actual presence of these values in the organizational context. The scholars argue that “cultural values can be created or strengthened”, although they explicitly acknowledge that prescribing for this creation or strengthening was not the aim of their contribution (ibid.: 94).

The role of organizational culture in learning has also been explored by Argote and Miron-Spektor (2011). In their theoretical framework, the researchers distinguish between active and latent when describing the organizational learning context. The difference is that the first context is actionable and the second is not (ibid.). However, the latent context has an impact on the active context. Organizational culture is part of the latent context, which means that it influences organizational learning. In this sense, culture is thought of as a potential facilitator of learning, an antecedent of learning (Bapuji & Crossan 2004).

4. Part II: Inter-Organizational Learning

4.1 Introduction

The review and elaborations presented thus far have focused on the intra-organizational environment. Originally, organizational learning was considered a purely intra-organizational phenomenon. Over the years, researchers have begun to recognize the importance of inter-organizational learning. This increased interest is related to the growing attention to phenomena such as the knowledge economy, digital transformation and global value networks, where organizational networks and collaboration have become more important. Over the years, there has been a growing awareness that the sources of knowledge necessary to compete, create value and survive are broad and not confined within any single organization. The degree of inter-organizational strategic integration has become so important that some argue that competition is between supply chains rather than individual companies (e.g., Zhu et al. 2018). Organizations are increasingly interdependent, highlighting the need to understand collaboration and how mutual gains can be generated (Carmeli et al. 2021).

Although many scholars of the literature on inter-organizational relations focus their works on competition between organizations (e.g., Carroll & Harrison 1994; Pfeffer & Leblebici 1973; Baum & Singh 1996; Baum & Mezias 1992; Tuckman 1998; Chong & Rundus 2004; Dodge et al. 1994), some recent studies emphasize that inter-organizational collaboration, interaction, exchange and sharing of information can enable organizations to increase their tangible and/or intangible resource pools, acquire critical assets and knowledge, foster innovation, foster growth and increase corporate market sharing (BPI Network 2014; KPMG 2018; Kumar 2012; Le Pennec & Raufflet 2018; Lo & Stepicheva

2016; Prange & Mayrhofer 2015; Varma et al. 2015; Scott & Davis 2016). In international contexts, collaboration can enable the absorption of fixed costs and the reduction of risks (Kumar 2012; KPMG 2018). In terms of the financial impact of collaboration, one study reports that alliances can contribute up to 26% of a company or a business unit revenue (Prange & Mayrhofer 2015). According to another study, alliances can contribute up to 50% to the corporate revenues (Kumar 2012: 35).

Some studies also show that organizations recognize the potential benefits of collaborative projects for their businesses. In a study conducted by the BPI network, partnerships and alliances are considered essential or important by 85% of respondents (Whitler 2014). In another study, the sum of "extremely important" and "important" is 92% (KPMG 2018). The latter study highlights that no respondents consider alliances "unimportant", meaning that "we do not intend to pursue strategic alliances" (ibid.: 3). Thus, although a proportion of respondents (8%) do not see strategic alliances at the forefront of their strategies, alliances are not precluded a priori. Such relevance goes beyond the corporate environment and extends to other types of organizations. A study using the corporate-NGO partnership as the unit of analysis reports that 90% of respondents believe that partnerships become "more" or "much more important" over the years (Le Pennec & Raufflet 2018: 817).

On the one hand, such empirical data supports a cooperative turn in inter-organizational relationships, but on the other hand it is not free of empirical challenges. One study highlights that the failure rate of inter-organizational cooperation is over 60% (Whitler 2014). According to another study, only 20% of strategic alliances are successful, and the 80% of failures involve companies of all sizes, including the most successful companies (Kumar 2012: 31). In a recent study, Thygeson et al. (2021) emphasize that relationship problems, i.e., the inability to collaborate, are the main obstacle to quality improvement. The reasons for this high failure rate have also been the subject of a number of studies. The studies do not highlight a single and clear reason for such failures, but point to multiple possible causes, such as commercial, strategic, operational, technical and cultural reasons (Deloitte 2019). This data may point to a lack of relational skills, which seems to be particularly pronounced in culturally heterogeneous contexts. One study reports that cultural misalignment is one of the causes of failure in 45% of alliances (Deloitte 2019). A study focusing on joint ventures between German and Chinese companies also reports that 70% of all failures in joint ventures between these two countries are due to "uninformed and unprofessional cultural management" (Wieland 2014a: 183). This lack of or inadequate cultural management as one of the causes for the failure of cooperative enterprises in business has also been discussed and analyzed in the literature (Kumar & Das 2010; Prange & Mayrhofer 2015; Tjemkes et al. 2012). For example, Le Pennec & Raufflet state as a result of a literature review that “the diversity of the collaborating members (…) tends to lead to distrust, conflict and failures” (2018: 819).

The data underlines the relevance of the ability to cooperate in organizational contexts and thus forms the terrain for a relational turn in the literature on inter-organizational learning. Accordingly, a relational view of the organization has gained prominence in the literature (Zhu et al. 2018; Binder 2019; Nyman 2019; Wieland 2020a). Successful and continuous cooperation has been identified as one of the most fundamental requirements for value creation in the modern economy (Wieland 2022). Such a fundamental collaborative capacity would concern both inter- and extra-firm relationships (ibid.). In this sense, it refers not only to relationships with suppliers, customers and other businesses, but also to relationships with non-governmental organizations, governments, communities, etc. Due to the diversity of reference systems, extra-firm relations would require additional polylingual competences. The latter would be defined as the competence to understand different language games that actors belonging to different systems (civil society, government, etc.) bring to the relation. From the perspective of the organization as a nexus of stakeholders´ resources, additional resources invested by additional stakeholders represent potential additional revenues (Wieland 2022), making the collaboration economically worthwhile.

As far as the organizational learning process is concerned, various terms have been used over the years to define and describe inter-organizational and cooperative learning. These terms include “relationship learning” (Selnes & Sallis 2003), “network learning” (Gibb et al. 2017, Knight 2002) or even “supply chain learning” (Zhu et al. 2018). Although at first glance these terms seem to overlap, it is interesting to note that supply chain usually refers to the buyer-seller relationship and does not usually take into account the broader range of stakeholders such as local communities, civil society organizations, etc. The concept of pure supply chain learning would be rather limiting compared to network learning. In the research at hand, relational organizational learning draws on the relational view of the organization (Wieland 2020a), in which the organization is seen as a nexus of stakeholders´ resources. From a learning perspective, this would mean that to conceptualize relational organizational learning all stakeholders that invest resources should be part of, and contribute to, the learning process.

4.2 Literature Review on Inter-Organizational Learning

In the traditional literature on organizational learning, organizational learning is mainly described as an intra-organizational process, i.e., a process that takes place within organizational boundaries. Although Levitt and March's (1998) concept of the "World of Learner" sets a starting point for the discussion of inter-organizational learning, the focus, at least until the mid-1990s, was on the intra-organizational environment. From the 1990s onwards, the inter-organizational perspective gained importance (Bapuji & Crossan 2004). In the literature on organizational learning, the inter-organizational perspective has been described in terms of external learning (Dodgson 1996), vicarious learning, namely learning from the experiences of other organizations (Huber1991) and congenital learning, namely learning from the experiences of the industry (Huber 1991). In a literature review, Crossan et al. (1995) identified inter-organizational learning as a fourth level of learning alongside the three traditional levels of organizational learning (individual, group and organizational). Furthermore, inter-organizational learning was referred to as "emergent" (ibid: 338). In fact, in the summary of the fourteen most influential papers on organizational learning presented by the researchers in the paper, only one paper dealt with the inter-organizational level (ibid.). In the same vein, Beeby and Booth (2000) argued for modifying Raschford and Coghlan's (1994) framework, which distinguishes between individual, team, interdepartmental and organizational levels of learning, to include the inter-organizational level. Argote and Miron-Spektor's (2011) theoretical framework for analyzing organizational learning included the "context" in which the organization is located and the inter-organizational level was one of the identified organizational levels of learning.

Apart from the debates in the organizational learning literature, the field of inter-organizational learning has also emerged as a distinct research area in relation to the organizational learning literature since the mid-1990s. Scholars in this stream have mainly focused on strategic alliances and networks (e.g., Levinson & Asahi 1995; Larsson et al. 1998; Beeby & Booth 2000). Some work also draws on social network theory (e.g., Levinson & Asahi 1995; Gibb et al. 2017).

The increasing importance of inter-organizational learning, both as an additional field of research and as a level of learning in the organizational learning literature, was not initially accompanied by a change in the unit of analysis. Most of the initial elaborations had as their unit of analysis the learning process of single organizations learning from competitors or cooperation partners - an intra-organizational learning process - and thus lacked what Larsson et al. called a “shift in the level of analysis” (1998: 286). For instance, in a 1998 paper, Lane and Lubatkin defined inter-organizational learning in terms of the relationship between “student” and “teacher” organizations. Although the process involves both organizations, the paper focuses mainly on the “student firm”.

Drawing on Thomas (1979), Larsson et al. (1998) propose a framework for identifying and explaining inter-organizational learning strategies based on two variables: Receptivity and transparency. Five learning strategies were identified: Competition (low transparency and high receptivity); avoidance (low receptivity and low transparency); accommodation (low receptivity and high transparency); collaboration (high receptivity and high transparency); compromise (in the middle). Collaboration, composed of high receptivity and high transparency would be the optimal pattern. The researchers applied game theory to explain suboptimal patterns. Different organizations may pursue different strategies, which in turn may lead to partners reacting and adapting, which the researchers believe can explain the failure of strategic alliances. They suggest some factors to overcome what they call the “game-theoretic barrier” (ibid.: 294), such as long-term orientation and trust.

Although the framework of Larsson et al. (1998) identifies obstacles and causes for the failure of inter-organizational learning, the key finding is that reciprocal collaborative learning would be the optimum form of inter-organizational learning. Mutual cooperation would require a shift from the role of single organizations (as teachers, as learners, etc.) to the role of the organization in the learning relation, thus meeting the above demand for a shift in the level of analysis in the study of inter-organizational learning. Bapuji and Crossan also pointed to the need for further research on inter-organizational learning to extend the level of analysis “beyond the firm” (2002: 398). Levinson and Asahi (1995) also emphasized the need to shift the focus from learning of individual organizations to “formally interconnected organizations” (Levinson & Asahi 1995: 51). The scholars also argued that there is a need to bridge the boundaries between organizations involved in inter-organizational learning and to engage in a “collective discovery” (ibid.).

One of the first contributions identified in this review to theories and models describing inter-organizational learning as a collective endeavour comes from Knight (2002) and her conceptualization of network learning. According to Knight, network learning takes place when “learning is embedded across the group of organizations as a whole” (Knight 2002: 435). Further contributions to the conceptualization of learning beyond intra-organizational boundaries come from Selnes and Sallis (2003), Bruneel et al. (2010), Heikkila & Gerlak (2013), Gibb et al. (2017), Nyman (2019), Binder (2019).

Selnes & Sallis (2003) developed the concept of relationship learning. Relationship in this case meant the customer-supplier relationship. Although the researchers used the term “relationship learning”, their elaboration could be conceptually adapted to supply chain learning. In their elaboration, the researchers described organizational learning as a process that is not limited to the boundaries of the organization. It could be considered as an initial step towards defining organizational learning as the learning of the nexus of stakeholders (Wieland 2020a).

The importance of learning across organizational boundaries was also explored by Bruneel et al. (2010), who conducted an empirical study on the role of cooperation in the internationalization of young companies. The study by Bruneel et al. (2010) provided empirical evidence of the relevance of collaborative inter-organizational learning to the internationalization process. In particular, the study highlighted that the effect of inter-organizational learning is higher in young firms that lack experience. However, this does not mean that experienced companies do not benefit from inter-organizational learning in their internationalization process, but rather that the impact of inter-organizational learning is not as great as in companies that lack experience (ibid.). In this study, the concept of inter-organizational learning was extended beyond formal joint ventures, M&A, subsidiaries and alliances to all stakeholders that can contribute to the learning process, i.e., financiers, suppliers, customers, to name but a few.

Recent literature argues for considering the network as a learning unit of analysis (Gibb et al. 2017; Binder 2019) and for linking network and organizational learning (Gibb et al. 2017), also in line with Larsson et al.´s (1998) previously discussed call for a “shift in the level of analysis”. On the one hand, the researchers emphasize that organizational learning has an impact on network learning, but also that network learning can lead to organizational learning.

These views would therefore be a broader view of relational learning compared to the elaborations on relationship learning and supply chain learning and would be in line with the relational view of learning adopted in the present research.

4.3 Linking Between Intra- and Inter-Organizational Learning

While debates on intra- and inter-organizational learning have been conducted in parallel, some scholars have called for an integration of inter-organizational learning into the organizational learning literature (e.g., Beeby & Booth 2000; Holmqvist 2003), as both concepts are intertwined. Holmqvist called for an overcoming of the "either/or" approach (either intra- or inter-organizational learning) in favour of a "both/and" approach (Holmqvist 2003):

> "The learning of single organizations is what drives the learning of interorganizational collaborations. (….) (and) the learning of interorganizational collaborations may affect the learning of single organizations." (Holmqvist 2003: 103)

Furthermore, Holmqvist calls for the concept of boundaries to be overcome and proposes viewing organizations as "inescapably interwoven in complex arrays of partnership relations" (Holmqvist 2003: 115), which is consistent with the view of the organization as a nexus of stakeholders´ interests and resources (Wieland: 2020a). In this complex array of relationships, inter-organizational learning would contemplate both joint learning by many organizations and learning by single organizations (Holmqvist 2003). The latter would, however, require "internalization" (ibid.). This view sees organizational learning as a multilevel process to achieve what Wiewiora et al. (2020) defines a "complete learning system".

Although this literature review highlights that the relational view of organizational learning has gained relevance in the literature, there are few studies that focus on it. From the results of a literature review conducted by Binder (2019), only a minority of articles apply a relational view to inter-organizational learning.

This lack of literature defining organizational learning as a relational process would mean that the conceptualization of organizational learning as a process for the relationalizing of rationalities for enabling the completion of multi-contextual transactions in the context of organizations intended as entities in their own right may require further elaboration, although the existing literature can provide some initial insights.

The following chapter focuses on the conceptual implications of the literature discussed and presents a conceptual analysis that aims to highlight the conceptual links between the existing literature and the conceptualization of relational learning as in this research, as well as the conceptual changes required for the conceptualization of organizational learning in the way it is suggested in this research.

Chapter Three

Conceptual Implications of the Literature Review

1. *Insights from the Literature Review*

The main conclusions that can be drawn from the literature review presented in the previous chapter are the following:

1. Individual learning theories (especially behaviourist, cognitive and social theories) have influenced the literature on organizational learning. Although there is a consensus that organizational learning is not individual learning, many of the contributions to organizational learning draw on individual learning literature. The consequence is that many contributions describe organizational learning as an extension of individual learning theories.
2. Scholars from the organizational learning literature have not placed as much emphasis on the definition of "organizations" as they have on the definition of "organizational learning". With a focus on the employees of organizations, many theories of organizational learning rely (explicitly or implicitly) on the definition of the organization as a group of employees.
3. Although there are some initial elaborations on learning as a relational process, in many elaborations in the stream of social organizational learning, relational learning is described as relationship learning (interpersonal relationship).
4. Models of organizational learning describe the outcomes of organizational learning that can enable adaptation to the environment and bring about better performance. Indeed, there is greater consensus that the trigger for organizational learning is the organizational environment.
5. Culture (and especially cultural diversity) is presented in organizational learning theory either as a possible obstacle or as an enhancer of organizational learning.

In this chapter, these five main findings are analyzed in detail. After the analysis of each finding, a conceptual analysis is presented. The latter has two main aims: First to explore conceptual links between existing definitions of organizational learning and the definition proposed in the research at hand. Second, to explore the conceptual changes required to define organizational learning as a process for the relationalizing of multiple rationalies to enable the completion of multi-contextual transactions in the context of organizations intended as entities in their own right.

2. Discussion of the Findings from the Literature Review

2.1 Influence of Individual Learning Theories in the Literature on Organizational Learning

Individual learning has an older tradition in the literature compared to organizational learning. While the first work identified in the literature review in the previous chapter dates back to 1936 (Wright's work on experiential learning curves), some scholars trace theories of individual learning back to the ancient Greek philosophers. In his paper, Grint (2007) applies Aristotle's Nicomachean Ethics and division between techné (knowledge), episteme (knowing why) and phronesis (practical wisdom). Bronstein (2016) highlights Aristotle's interest in learning in Posterior Analytics, and how the philosopher identified three types of learning in Metaphysics (learning by demonstration, learning by definition and learning by induction). Stonehouse et al. (2010) highlight how some of the works of Aristotle, Plato and Socrates contributed to experiential learning. In particular, the scholars define Aristotle as a precursor to the experiential learning cycle (ibid.). The scholars further cite the contributions of Socrates' Elenctic Method, Plato´s Republic, Aristotle´s Nicomachean Ethics to the field (ibid.).

In terms of more recent elaborations, behaviourism, cognitive, social, socio-constructive and experiential learning theories have dominated the discussion on learning over the last century (UNESCO International Bureau of Education 2022)[12].

[12]A detailed discussion of each of these theories goes beyond the scope of this research. For an overview on the different approaches to individual learning, see the pioneering works by Thorndike (1927) and Skinner (1974) for the behaviourism learning theory; Piaget (1932, 1936, 1945, 1957) for the cognitive learning theory; Dewey (1938) for the experiential

When scholars began to explore the phenomenon of organizational learning, the literature on individual learning theories was already a consolidated stream of research. The concept of learning as understood in individual learning theories applied in the field of teaching and education was (and is) the main way of conceiving and thinking of learning (Elkjaer 2003). The literature review revealed that many scholars of organizational learning also draw on this understanding of learning and focus on how individuals learn within the organization and how this leads to organizational learning. Over the years, this influence of individual learning theory has led to many works defining and describing organizational learning in behavioural, cognitive, experiential and social approaches (see literature review in previous chapter). Many scholars conceptualized organizational learning as an extension of individual learning theories. This extension led to some of the ontological issues identified by Cook & Yanow (1993) caused by theories of organizational learning that either focus on how individual learning processes occur in organizations or threaten organizations as having individual properties (mind, cognitive systems, etc.) (ibid.). The first ontological issue would lead to the claim that there is no organizational learning, but only individual learning in organizations. Organizational learning would therefore be a mere metaphor (Popper & Lipshitz 1998). The second ontological problem would lead to anthropomorphism (Crossan et al. 1995; Popper & Lipshitz 1998).

If the organization is neither like an individual nor simply a sum of its individuals, then the organization cannot learn as individuals learn (as already pointed out by Cook & Yanow 1993). In the study at hand, the organization is conceptualized as an entity in its own right and organizational learning is conceptualized in terms of learning by the entity. As a distinct entity, individual organizational members or stakeholders of the organization would be akin to organizational citizens (bearing in mind Commons 1934). Individuals (or more generally stakeholders and their resources) may come and go and the organization continues to exist. The organization as entity can reach goals that go far beyond the reach of single individuals (Scott & Davis 2016). In this view, organizations as entities that differ from their employees is a concept that has already been empirically demonstrated by the existence of hundred-year-old

learning theory; Bandura (1971) for the social learning theory; Vygotsky (1978) for the socio-constructionism learning theory.

(and in rare cases thousand-year-old) organizations[13]. On this point, some data on organizations' (firms') longevity in different parts of the world has already been presented (e.g., Gosh 2020) (Figure 6).

Figure 6: Long-Lived Companies Still Running. Source: Ghosh (2020).

[13] Although the organization as conceived today emerged as a result of the industrial revolution during the seventeenth and eighteenth centuries (Scott & Davis 2016).

The study extracted from the visual representation the top ten oldest firms (see table below).

Year	Company Name	Country	Industry
578	Kongō Gumi Co., Ltd.	Japan	Construction
803	St. Peter Stifts Kulinarium	Austria	Service Industry (Restaurant)
862	Staffelter Hof	Germany	Distillers, Vintners, & Breweries (Winery)
864	Monnaie de Paris	France	Manufacturing & Production (Mint)
886	The Royal Mint	England	Manufacturing & Production (Mint)
900	Sean's Bar	Ireland	Service Industry (Pub)
1040	Pontificia Fonderia Marinelli	Italy	Manufacturing & Production (Bell foundry)
1074	Affligem Brewery	Belgium	Distillers, Vintners, & Breweries
1135	Munke Mølle	Denmark	Manufacturing & Production (Flour Mill)
1153	Ma Yu Ching's Bucket Chicken House	China	Service Industry (Restaurant)

Table 5: Oldest Companies Still Running. Source: Ghosh (2020).

Gosh´s study on organizational longevity only contains the organizational form “firm”. This list can be extended by other forms of organizations. Regarding the organizational form “university”, for instance, the University of Bologna was founded at the end of the 12th century, the Universities of Paris, Oxford, Cambridge and Montpellier were founded at the beginning of the 13th century. There are also examples of relatively long-lived organizations in newer organizational types, such as NGOs, modern political parties and trade unions. As far as NGOs are concerned, for example, the Naturschutzbund Deutschland - NABU, a German non-profit organization, was founded in 1899 (Rösler 2014). As for political parties, for example, the Democratic Party has existed in the USA since 1828 (Meyers 2004). Finally, the Trades Union Congress - TUC has been around since 1868 (Lovell & Roberts 1968).

To explain the success of organizations over years, many scholars studied the role of specific individuals for organizational success. This is the case of founders and leaders. On this point, the literature points to the role of the founders in creating the organizational culture (e.g., Schein 1996). Many contributions to the literature on leadership styles also emphasize the role of leaders in organizational success (e.g., Hopen 2010; Mullins & Linehan 2005; Oreg & Berson 2019; Farahnak et al. 2020). While these studies focus on individual characteristics and capabilities, they emphasize the role of leaders in promoting the organization as a self-reliant entity to achieve its goals by relationalizing different interests and logics: The role of leaders in encouraging and supporting the efforts of others (Hopen 2010); the process of social influence in leadership and the need to facilitate collective efforts to achieve the common goal of the organization (Oreg & Berson 2019: 273); the importance for leaders of influencing the organizational climate and motivating organizational members to overcome their self-interest for the good of the team and the organization (Farahnak et al. 2020: 100); Mullins & Linehan's work (2005) highlights the need for the leader of the sector under study (libraries) at the time of their research (2005) to change the organizational culture, which is again a process that affects the organization.

The implications of these studies for organizational learning are that while they focus on the role of specific leaders, they describe processes that develop and change the whole organization. In a sense, leaders would promote the continuous reorganization of stakeholders' resources and thus the structure formation that relates to the organization per se rather than to individual employees or, more generally, stakeholders. Gosh's (2020) study highlights how the organization persists and learns from generation to generation, and allows to shed light on the distinction between organizational leaders and employees (and in general stakeholders) and the organization. Although founders and leaders may play a crucial role at the current moment of their role, their lifespan would (at least in the case of successful longstanding organizations) be too short to explain organizational learning. This would require a conceptualization of OL that goes beyond individual learning in organizations.

The argument in the organizational learning literature to conceptualize organizational learning as individual learning is based on the assumption that learning is a purely cognitive process that takes place in individuals' minds. As discussed in the previous chapter, relevant scholars base their conceptualization on this proposition. These include influential scholars such as Hebert Simon, Ikujiro Nonaka and Daniel H. Kim (see point 3.2 in chapter two). However, in the literature, learning is also conceptualized in terms of machine learning. The latter refers to a computer-based learning approach in which a machine is conceptualized as a learner (Langley 2011; Bi et al. 2019). To analyze the literature on machine learning in detail is beyond the scope of this research. What is relevant to the scope of this research is the argument, already made explicitly in the machine learning literature, that learning can be conceptualized beyond human cognition. This is not about replacing individual cognitive learning, but about distinguishing different learning phenomena. In the specific case of machine learning, the literature has shown that machine learning is possible (Langley 2011). Scholars in the machine learning literature conceptualize learning within the framework of artificial intelligence. In this way, and based on mathematical algorithms, machine learning conceptualizes learning as a different phenomenon from cognitive individual learning with different learning mechanisms.

2.2 Nature of Organization in the Roots of Organizational Learning

The influence of individual learning on organizational learning may also be related to the nature of organization in the roots of existing organizational learning theories. Scholars from the organizational learning literature have not placed as much emphasis on (explicitly) defining "organization" as they have on defining "organizational learning"[14]. From a literature review, it appears that only some scholars have made the nature of organizations explicit behind their elaborations on organizational learning (Table 6).

It is interesting to note that the specification of the organizational nature in the framework of organizational learning theories was made explicit in elaborations from the late 1970s to the 1990s, i.e., the period defined in the research at hand as the golden age of organizational learning literature (see Figure 5 in chapter two). One possible reason for the lack of explicit specifications of the nature of organization in the current literature could be that, although there is not yet a consensus on the definition of organizational learning, the field of research is consolidated. Such consolidation makes organizational learning an accepted concept, which may result in less explicit specification of the nature of organization.

Since organizational learning is a sub-research stream of organizational and managerial studies, the nature of organization in existing organizational theories[15] has influenced the nature of organization in organizational learning theories, too. Elkjaer (2003) highlights how different approaches towards organizational learning (in particular, as already discussed in chapter two, she distinguishes between organizational learning as "acquisition" and "participation" metaphors) are rooted in different understandings of organization. According to her, the cognitive approach of organizational

[14] For an overview of some definitions of organizational learning proposed in the literature, see the table in the appendix.

[15] Some scholars refer to these theories as management theories, other as organizational theories. In this research the term "organizational theory" will be applied.

learning (acquisition metaphor) is rooted in the view of organization as a system and the social approach of organizational learning (participation metaphor) is rooted in the view of organization as communities or collectives.

Scholar(s)	**Definition**
Duncan & Weiss (1978: 79)	Organization as mechanism to transform input into output: "Group of individuals who engage in activities which transform, or support the transformation of some set of inputs into some set of outputs"
Daft & Weick (1984: 285)	Organizations as interpretation systems: "Organizations are open social systems that process information from the environment"
Levitt & March (1988: 331)	Organization as sub-units of learning: "Organizations are collections of sub-units of learning in an environment that consists largely of other collections of learning subunits"
Brown & Duguid (1991)	Organization as community of practice
Cook & Yanow (1993: 379)	Organization as cultural entity, namely "as a group of individuals acting collectively"
Kim (1993)	Organization as a group of people
Klimecki & Lassleben (1998a)	Organization as learning systems
Popper & Lipshitz (1998: 170)	Structural view on organization: "A collective becomes an organization once it develops procedures and structures (e.g., voting rules and management systems) that allow it to act as a unit"
Elkjaer, B. (2003)	Organization as social world

Table 6: Nature of Organizations Behind Organizational Learning Theories. Source: Own table.

An overview of organizational learning theories when different definitions of organizational learning emerged may be useful to better understand the theoretical roots of organizational learning and the concept of organization behind these theories. Organization theories can be divided into classical organizational theory, neoclassical organizational theory, and modern organizational theory (Oyibo & Gabriel 2020; Bueno & Salapa 2021; Günbayi & Sorm 2019; Hussain et al. 2019). Another theoretical division is between the rational, natural and open system definitions of organization (Scott & Davis 2016). In the following, the division between classic, neoclassic and modern theories is followed[16]. The conceptual distinction does not mean that theories belonging to a particular school of thought are homogeneous. The literature on organizational study, like the literature on organizational learning, is indeed interdisciplinary (Scott & Davis 2016). This interdisciplinarity hindered consensus in the literature and Scott & Davis (2016) highlighted the "paradigm war" in the field in the period from the 1960s to 1990s. In general, classical organizational theory emerged as a response to the challenges of the industrial revolution at the end of the 19th century (Oyibo & Gabriel 2020). The shift from an agricultural era to an industrial era brought challenges to emerging industrial firms. In response to these challenges, scholars like Max Weber (1904/2005) and Frederick W. Taylor (1919) conceptualized firms as machines that function thanks to a clear division of labour within the organization. Max Weber's (1904/2005) bureaucratic theory applied the organizational principles of military and government organizations to firms. This theory is based on the repetition of tasks, specialization and clear division of labour between employees (ibid.). The classic theories also include the work of Frederick W. Taylor (1919) and his principles of scientific management of work in organizations with the aim of increasing organizational performance through increasing employees´ productivity.

One of the main criticisms to classical organizational theories refers to the dehumanization of organizations. These criticisms induced scholars starting from the 1940s to develop humanized organizational studies, namely studies that took into consideration the role of human beings within organizations, their emotions, behaviours, needs, inter alia. The work of Maslow (1943) on the hierarchy of needs to explain human motivation influenced this change in organizational theories. This theoretical approach, known as neoclassical organizational theory, was pioneered by the work by Elton Mayo (1945). Mayo conducted a study at the Hawthorne plant of the Western Electric Company. In this study, Mayo examined the social factors for improving labour productivity. In particular, Mayo found that economic incentives are not enough to foster employees´ productivity, as social factors are determinant. To the ranks of neoclassic scholars, we must also include Selznick (1948). He defines organizations as "the arrangements of personnel for facilitating the

[16] These distinctions in a way overlap. Many theories defined by scholars as classical and neoclassical theoreticians, in Scott & Davis (2016) fall under the rational and natural definition of organization. The open system view as elaborated by Scott & Davis somehow overlaps with modern organizational theory.

accomplishments of some agreed purpose through the allocation of functions and responsibilities" (Selznick 1948: 25). The arrangements of personnel require patterns of coordination (ibid.). Selznick stresses the importance of interchangeability of employees to ensure independence from individual characteristics, and underlines that the organizational system is both an economy and an adaptive social structure (ibid.). He emphasizes the role of individuals in the organizational system and the fact that it is not possible to depersonalize organizational roles in the sense that individuals participate in their roles as wholes (ibid.).

Neoclassic organizational theories can be conceptually divided into the human relation school and the behavioural school (Oyibo & Gabriel 2020). The mentioned initial contributions to neoclassic organization theory focused on human relation. The behavioural school includes, for example, the works of Simon (1947/1976), Cyert and March (1963), Galbraith (1974). Hebert Simon (1947/1976) studied the bounded rationality of individuals that influences decision-making processes in organizations. Simon's work on bounded rationality had a significant influence on the work of later organizational scholars. For example, based on Simon's bounded rationality, Cyert and March (1963) developed the behavioural theory of the firm, which aims to explain the decision-making processes of the firm in its environment. Cyert and March (ibid.) stand in contrast to economic elaborations that define firms as profit-maximising entities (ibid.). Due to bounded rationality, companies also accept suboptimal outcomes (ibid.). Simon also influenced Galbraith's (1974) elaborations on the organizational design of information processing, which emphasize the importance of organizational coordination and integration mechanisms between interdependent roles to improve information processing capabilities.

In the shift from classic to neoclassic, the nature of organization shifted from a machine operated by employees to organization as a social system. Despite conceptual differences, both neoclassic and classic organizational theories focused on structures and mechanisms to foster employees´ productivity within organizational boundaries (Bueno & Salapa 2021). The outcome (employees´ productivity) remained the same, what changed was the methods to foster productivity. This methodological shift was triggered by a shift in the nature of man (and woman) in the roots of these organizational theories (Günbayi & Sorm 2019). While classic organizational theory draws on the homo-economicus man/woman, neoclassic organizational theories draw on social man/woman (ibid.). Homo-economicus is a man/woman motivated by economic gain (ibid.).

Neoclassic organizational theories challenged this view. In neoclassic theory, man/woman is a social animal (ibid.). Both natures of man/woman have been criticized for being simplistic and generalized assumptions on human nature (ibid.). An alternative view defines men/women as complex human beings (ibid.). According to this complex view of human nature, man/woman is “multiplex and varied”. Different human beings can have different needs or, still, the same human being can have different needs and behave differently in different contexts and situations (ibid.), which make it complex to predict the behaviour of individual employees, leaders and stakeholders within organizations.

These natures of organization and of the men/women within the organization have influenced the nature of organizations in organizational learning elaborations. The first definition in Table 6 refers to organization as an input-output “machine”, a view coherent with the nature of organization in classic organizational theories. Successive organizational learning has drawn on a more humanized view of organization, highlighting the conceptual shift from a classic to neoclassic view of organization. Indeed, initial organizational learning studies were contemporary to the neoclassic theory of organization. In the theoretical framework of neoclassic theories, organizational learning theories embraced humanist and behaviourist views on organization, thereby focusing on individuals and behaviours within organizations. This view can clearly be seen in the work of organizational learning scholars such as Kim, Argyris, March, to name but a few influential examples (see chapter two). The emphasis on social man/woman has also been captured in the literature review presented in chapter two. As discussed in that chapter, starting from the 1990s onward, the organizational learning literature has been influenced by social capital literature and social learning theories.

Currently, the neoclassic organizational theory has been challenged by the modern organizational theory. While both classic and neoclassic theories conceptualized organization within its institutional boundaries and emphasize employees´ productivity, modern organizational theories conceptualize organizations as dynamic open systems (Oyibo & Gabriel 2020; Bueno & Salapa 2021). Till the definition of organizations as open systems, scholars conceptualized organizations as closed systems composed of their members (employees) and distinct from their environment (Scott & Davis 2016). This has also been captured in the literature review in chapter two, highlighting how many scholars conceptualize organizational learning as an intra-organizational phenomenon, coherent with a classic and neoclassic view of organization.

Although the nature of organizations by organizational learning scholars presented in Table 6 highlighted this shift towards organizations as open systems (and not mere input-output machines), organizational learning remains an intra-organizational phenomenon focused on organizational employees. While the literature has recognized that the organization is influenced by its environment, organizational learning has mainly been conceptualized in intra-organizational terms (a symptom of a closed system, at least from an organizational learning perspective).

While classical and neoclassical organizational theories were triggered by the challenges of their time, such as the industrial revolution, modern organizational theory was triggered by the challenges and opportunities of the 21st century. Indeed, as highlighted by Scott and Davis (2016), changes in the organizational empirical world foster changes in the nature of the organization[17]. In the 21st century, the empirical world includes challenges and opportunities related to VUCA, polycentricity, globalization, complexity, global value networks, SDGs, networking, greater interconnectedness between different organizations, open innovation, inter alia. These changes have been the catalyst for a paradigm shift in organizational theory. One of the criticisms in modern organizational studies of the neoclassic view of organization concerns the differences of needs, aspirations, motives and potential between individuals and organization (Hussain et al. 2019). This criticism opens the way for a clearer distinction between individuals and organization as entity. Scholars from the inter-organizational learning have made some effort to conceptualize organizational learning both as an intra- and inter-organizational phenomenon, coherent with a view of the organization as an open system. These efforts include a call for a shift in the unit of analysis of organizational learning from single organizations to networks (Larsson et al. 1998). Other contributions include, e.g., the definition of organization, already presented in chapter two, as "inescapably interwoven in complex arrays of partnership relations" (Holmqvist 2003: 115) and the current elaborations on organizational learning embedded in a complete learning system (Wiewiora et al. 2020). In a recent contribution, Wendt and Manhart (2022) define the organization as complex system and argue for organizational

[17] For an overview on how the empirical world of organizations has changed over the years, see chapter 13 by Scott & Davis (2016).

"*bildung*"[18] as a response to the current organizational, socially and economically complex challenges and opportunities. These studies nevertheless still represent a minority (Binder 2019).

The research at hand aims to contribute to the further development of this research stream of organizational learning based on modern organizational theory. In particular, it aims to contribute to conceptualizing organizational learning as both an intra and inter-organizational phenomenon that takes into consideration the organizational nexus of stakeholders´ resources and interests.

As discussed in chapter one, the nature of the organization adopted in the research at hand draws on the nature of the organization in the theory of relational economics (Wieland 2020a). According to this theory, organizations are cooperative projects of society. In this way, similar to the neoclassic view on organization, in relational economics, too, the organization is a social system (ibid.). Nevertheless, unlike the neoclassic view, the system is open beyond institutional boundaries: It is not only employees who make up the system, but the whole organizational nexus of stakeholders that invest resources and who can be both individual and collective actors and be placed within or beyond organizational institutional boundaries (Wieland 2020a). The organization represents a vehicle that stakeholders use to carry out transactions with the aim of obtaining a factor income plus a cooperation rent (ibid.). Organizational transactions involve a variety of stakeholders´ resources. Although employees and managers (organizational personnel) are also stakeholders and invest their resources in the organizational entity (e.g., skills), other stakeholders, including those outside the organizational institutional boundaries, are also part of the nexus. Cyert and March (1963) also conceptualize the organization as a coalition of stakeholders (inside and outside organizational boundaries). In particular, for the scholars (ibid.) organizations are a coalition of stakeholders whose interests may be in conflict. The firm´s bargaining process determines how these conflicts are resolved (ibid). In this view, organizational learning is a process of managing divergent goals and conflicting interests (Levinthal & Rerup 2021). Although part of the neoclassic behavioral school of thought, Cyert & March's work represents a contribution to the view of the organization as open system, which has been gaining further relevance in modern theories. Unlike March and Cyert's coalition of stakeholders, relational economics' nexus of stakeholders does not

[18] Bildung can be translated as "training", "education", but the way the scholars framed it, it can also be interpreted as "learning". The scholars used the German genitive "Die Bildung *der* Organisation", highlighting that it refers to the organizational entity.

emphasize the conflicting interests of the stakeholders who invest their resources. Although a conflict of interest cannot be excluded a priori, in relational economics the focus is on the call for the relationalization of different rationalities (and interests) for conducting transactions. In this sense, the interests of the different stakeholders should be relationalized to ensure the continuity of cooperation. This would be coherent with a modern view of organization that operates in complex and polycentric societies in which to operate different rationalities are to be considered and relationalized.

Even though in relational economics organizations are defined as a nexus of stakeholders' resources and interests, they exist as separate entities (Wieland 2020a). The distinction between stakeholders and organization would make possible the distinction between organization as a noun and a verb. Issues such as division of labour and employee productivity (e.g., in the classic theory, like in the elaborations of Weber 1904/2005 and Taylor 1919 and in the neoclassic theory on how to motivate employees) can be associated with the verb "to organize", i.e., how human resources are "organized" to conduct the business. Organization as a noun considers the organization as a separate entity. The organization as an entity in its own right provides a governance structure in which transactions are conducted. The concept of organization as entity in its own right separated from organizational stakeholders allows one to take into consideration the already highlighted differences in needs, aspirations, motives and potential between individuals and organization (Hussain et al. 2019). Weick also elaborated on the organization as a noun. In particular, he argues that the organization as a noun is a myth, in particular he argues "if one looks for an organization one will not find it. What will be found is that there are events, linked together, that transpire within concrete walls and these sequences, their pathways, their timing, are the forms we erroneously make into substance when we talk about an organization" (Weick 1974: 358). Although the concept of organization as nexus of stakeholders as elaborated in this thesis rejects a substantialist view of organization and organzational leaning, and it does accept and indeed draws on the relational idea of organization as a link of events (as in the quote by Weick 1974), this does not exclude the organization being ontologically real, therefore a noun (the discussion on the ontological status of organization is discussed in detail in the next chapter). The debates on organization as noun and verb could be dissolved by adopting a "both-and" approach, namely understanding organizations as "processual entities"

(Schoeneborn et al. 2019). It exists as an entity that creates and is recreated through transactions, that has both form and processes[19].

The conceptualization of organizational learning as learning by the organization would require accepting that learning is not only a cognitive process but can be conceptualized beyond individual cognitive systems. The conceptualization of learning beyond human cognition has already been elaborated in other streams of the scientific literature, such as in the literature on machine learning (as discussed previously).

In summary, neither the classic nor neoclassic theory make a clear distinction between organization as noun and as verb, although recent literature on organizational studies calls for a both-and approach (the approach also adopted in this research). Furthermore, organizational learning contributions drawing on the classic and neoclassic conceptualize organizational learning in intra-organizational terms. Classic and neoclassic theories of organization and organizational learning draw on a specific nature of man/woman. The focus on the nature of human beings within organizations led scholars to draw on individual learning theories to conceptualize organizational learning. This study, on the other hand, draws on relational economics theory (Wieland 2020a) and recent elaborations on organizational learning in terms of networks (modern theory on organization).

2.3 Relational and Relationship

The nature of the organization in neoclassic terms and the connected emphasis on the human side of organization led to conceptualizing organizational learning processes in terms of interpersonal relationships. In relational economics theory, a distinction is drawn between the term “relational” and “interpersonal relationships”. Indeed, in relational economics theory, “relational” is not synonymous with “interpersonal relationship” (Wieland 2020a). In relational economics theory (Wieland 2020a), it is not (only) individuals that are to be relationalized, but polyvalent events, namely different contexts (polycontextuality), logics (polycontextuality) and language games (polylinguality). On the other hand, in the neoclassic view, the organization and its “people” are, in a sense, conceptually linked. Within the theoretical

[19] A recent stream in the organization literature views organization as an “adjective” with the focus on “organizationality” (Schoeneborn et al. 2019).

framework of humanistic and behaviorist neoclassical organizational theory, organizational learning theories were conceptualized in terms of individual learning. In a humanized organization, interpersonal relationships play a crucial role. The literature review in chapter two includes the review of organizational learning literature based on social learning theories. The social learning theory (Bandura 1977), on which some scholars on the social learning stream of organizational learning have drawn, is an individual learning theory that focuses on the social process of learning. It is a theory that conceptualizes (individual) learning as a new pattern of (individual) behaviours by direct experience or by observing others (vicarious learning). In this sense, in its initial elaboration, it did not consider collective (let alone organizational) learning. It rather focused on the individual behaviour in the social context. As individual learning, it focused on interpersonal relationships. The organizational learning elaborations that are influenced by the social learning theory define learning as a social process that takes place in the social context of organization (Lave & Wenger 1991; Wenger 1998; Wenger et al. 2002). This form of learning has been defined as situated learning (ibid.). Situated learning takes place in communities of practice (CoPs). In the situated social context, actors interact. The process is collective and organizational learning is thought of as interpersonal relationships.

The concept of vicarious learning (learning by observing others) has also been applied to organizations (e.g., Huber 1991), understood as organizations learning from other organizations. Network learning also concerns relations between organizations. In these examples (vicarious and network learning), the resulting learning would be organizational and not individual. In fact, changes in organizational procedures, structures, processes and strategies resulting from learning would also be organizational learning.

The conceptualization of organizational learning within the theoretical framework of relational economics also requires interpersonal relationships. The difference is that the relationship can also involve collective stakeholders and it is not sufficient to merely relate persons. What matters is not creating a context for interpersonal relations per se. What counts are the multiple rationalities that are brought into the relation. Although vicarious learning and the social learning stream of organizational learning theories conceptualize social learning as organizational, the process of relationalization of multiple rationalities occurring is not explained, highlighting a research gap. In this sense, for conceptualized learning as in this research, existing social learning theory (e.g., CoPs) are to be re-conceptualized in terms of situated context for the relationalization of multiple rationalities and not as mere interpersonal relationships. How existing organizational social learning theories can be re-conceptualized in terms of the relationalization of rationalities will be discussed in detail in chapters five and six.

An important specification is that a conceptualization of organizational learning in terms of the relationalization of multiple rationalities does not imply dehumanizing the organization. Human beings are still in the organization. The aim is rather to distinguish between learning as an individual phenomenon within the organization from learning as learning by the entity.

2.4 Triggers and Outcomes of Organizational Learning

Apart from the debates on the nature of organization, the role of man/woman in the organization, the connected influence of individual learning for conceptualizing organizational learning as well as the distinction between relational and interpersonal relationships, another aspect relevant for conceptualizing organizational learning in the framework of relational economics is the role played by organizational environment in the learning process and the associated trigger of learning. On this point, there is large consensus in the existing literature that organizational learning is triggered by changes in the environment (Shrivastava 1983; Daft & Weick 1984; Huber 1991; Dodgson 1993; Argyris 1993; Klimecki & Lassleben 1998a; Popper & Lipshitz 2000; Liu 2018; Nyman 2019). Particular emphasis is placed on the dynamism of the environment (e.g., Liu 2018) and the need to respond in order to remain competitive (e.g., Dodgson 1993). The environment is thus a source of external pressure (Nyman 2019) and thereby remains exogenous to the organizational system.

This view of the environment as a trigger of organizational learning influenced elaborations in the literature on organizational learning outcomes. Outcomes are defined by many scholars as what enables the organization to respond to its environment (see table below). In the view of an exogenous environment, the organization should be able, within its boundaries, to receive information from its environment, take advantage of opportunities from the environment, face challenges from the environment, adapt or even proactively contribute to changing its environment.

Scholar(s)	Outcomes of Organizational Learning
Shrivastava (1983)	Adaptation to the environment, knowledge, detection and correction of errors, experience curves
Duncan & Weiss (1978)	Knowledge
Daft & Weick (1984)	Interpreted information from the environment and action
Levitt & March (1988)	Routines (that may lead to performance outcomes and targets)
March (1991)	Knowledge, performance and competitive advantage
Huber (1991)	(Useful) knowledge
Brown & Duguid (1991)	Practices and related innovations
Dodgson (1993)	Manifold: Adaptation, improved efficiency, productivity, enhanced organizational capability, innovation
Argyris (1993)	Action (diagnosis of errors and intervention)
Klimecki & Lassleben (1998a)	Change of organizational knowledge that allows the organization to survive in new environmental conditions
Crossan et al. (1999	Strategic renewal
Lipshitz et al. (2002)	Valid knowledge and action to produce new perceptions, goals and/or strategies
Jimenez-Jimenez & Sanz-Valle (2011)	Knowledge (then innovation and performance)
Argote (2011); Argote & Miron-Spektor (2011)	Knowledge as result of experience
Brix (2017)	Knowledge
Barao et al. (2017)	Knowledge
Liu (2018)	Information that should be transformed into knowledge to capture market opportunities and thereby increase performance
Nyman (2019)	New information translated into knowledge that leads to actions
Tortorella et al. (2020)	Knowledge which leads to growth, innovation and performance

Table 7: Outputs of Organizational Learning According to the Literature. Source: Own table.

Scott & Davis (2016) define this view of the organization as something that must defend itself from the attacks from environment as being mistaken, since (at least in the view of organization as open system) interaction with the environment is essential for the functioning of the organizational system. In the view of organization as a nexus of stakeholders´ resources the organization is an open system that transcends institutional boundaries. Accordingly, the environment would no longer be a source of external pressure, but would be endogenized. The environment would "infiltrate" the organization (Scott & Davis 2016). In this view, the environment would coincide with the nexus of stakeholders' resources. Therefore, the pressures would not be "external", but come from the endogenized nexus. Endogenization here would not mean that the different stakeholders in the nexus that invest different resources in organizational transactions are operatively coupled, but that the different stakeholders influence and are part of the organizational learning process. This would be a form of network learning, as suggested in the inter-organizational literature, a shift from an intra-organizational view of organizational learning to a view of network as learner (see chapter two).

This environmental endogenization may be exemplified by an example provided by Wieland (2022: 27ff.). The example concerns the Foreign Corrupt Practices Act (FCPA), which was ratified in the USA in 1977. In particular, this is an example of how relational transactions involving resources from different stakeholders are multicontextual and that these rationalities must be relationalized. Multicontextual means that relational transactions involve stakeholders´ resources from different systems and involve different language logics. In particular, the ratification of the FCPA is an example of how economic organizations (coupled with the system market) act in relation to the "legal system" and how legal rationality is incorporated into economic transactions. From an organizational learning perspective, the FCPA represented a trigger for learning that originated from one organizational stakeholder in the legal system. From a firm´s perspective, adapting to the FCPA required changes in the governance structure and thus an organizational learning process as a response to the FCPA. The reorganization of the governance structure led to new procedures and standards to be followed by the staff of the organization (an impact within the organizational boundaries). However, the changes in the organization were not limited to the institutional boundaries of the organization, but also had an impact outside the organization, for example, on its suppliers. On the other hand, the FCPA did not only affect economic organizations. It also affected, for example, civil society organizations and education systems (also potential stakeholders of a firm). As far as the former is concerned, it could affect, for example, civil society organizations working in the field of corruption monitoring. As for the education system, the FCPA impacted on curricula, which were changed by the inclusion of business ethics programmes. On the other hand, the language games brought by organizations from these different systems are also relationalized in transactions of business organizations. This is the case, for example, when non-governmental organizations support the introduction of new legal norms in companies (Wieland 2022). In this sense, the organizational learning process would be a morphogenesis process (Scott & Davis 2016), intended as a process that changes the nexus. The trigger that led to changes in intra-organizational contexts (in the context of specific firms, civil society, universities, courts of law) influenced other organizations that were part of a nexus of stakeholders´ resources. The learning process did not regard isolated organizations but the nexus (or at least a part of it). The unit of analysis for organizational learning would no longer be the single organization, but the nexus of stakeholders.

Although the learning may regard the nexus (network view of learning), the different involved organizations remain operatively distinguished. As discussed in chapter one, different types of organizations that invest resources in organizational transactions (NGOs, universities, courts of law, etc.) are coupled with different systems of reference (market for firms, civil society for NGOs, politics for political parties, etc.). Even if the organization engaged in a nexus of stakeholders´ resources can temporally apply the guiding difference of different systems in the context of temporally limited specific multicontextual transactions (as in the FCPA example), it remains operatively coupled to its reference system and will not adopt the binary coding of other systems. NGOs that may invest the intangible resource “legitimacy” in the nexus of resources remain coupled with the system civil society. As in the system civil society, NGOs may react to triggers in the environment because they are interested in increasing engagement. Universities operating in the system science may have reacted to the trigger to foster academic debate. Looking at the example of the organizational type “firm”, although in multicontextual transactions several rationalities can be related (law, civil society, ethics, etc. as in the example presented and discussed above), it does not adopt the binary coding of other systems. The guiding difference for firms will remain “earnings-costs”. The surplus of income over costs (profit) is what will ultimately ensure the survival of the firm in the long run. This is not to suggest that the main task of the firm is to maximize profits for its shareholders, as Milton Friedman (1970) claims. Firms, and organizations in general, apart from being a nexus of stakeholders, as entities in their own right, are social institutions in the sense that they are stakeholders of society and may survive in the long run as far as they provide value for society (Wieland 2020a). But for the entity firm, after all, what really fosters learning in firms is the guiding difference income-cost, just as it would be for political parties to govern, for NGOs to increase engagement, for religious organizations to increase the number of believers and keep them engaged. In a nutshell, although changes in the endogenized nexus trigger learning, the guiding differences would be the motivation for learning of the single organizations involved, because these guiding differences would allow the organization to keep producing value and survive in the long run.

In conclusion, the FCPA example illustrates how different logics of different stakeholders (a firm´s earnings-cost, law´s legal-illegal, civil society´s common good-private interests) that invest different resources need to be relationalized in relational transactions, and how this relationalization requires a reorganization of governance structures, and thus continuous learning processes to maintain an appropriate governance structure. In this view, polyvalent events are not mere externalities but are endogenized by governance structures (Wieland 2022).

The conceptualization of organizational learning within the framework of relational economics theory would have implications for the trigger and desired outcome of learning. If the organization is viewed as a nexus of stakeholders´ resources, this nexus would represent the organizational environment (at least from an organizational learning perspective), and thus the environment becomes endogenized. Different organizations in the nexus are nevertheless coupled to different systems of reference and are guided by different guiding differences. It is these guiding differences (revenue > costs, to govern, common good, etc.) that keep the organization alive and are therefore the desired outcome of learning and the reason why organizations react to (endogenized) environmental triggers and learn.

2.5 The Role of Different Rationalities as Culture in the Relational Organizational Learning Process

The different rationalities of the different stakeholders that invest resources in the nexus and that form the environment of organizational learning can be generalized as culture (Wieland 2020a). To put it more specifically, in relational economics theory (ibid.), different social norms (relating to ethics, freedom, equality, etc.) generate expectations in relation to relational transactions (ibid.). Relational economics theory generalizes these social norms as cultural events (ibid.). In the course of relational transactions, cultural events are to be relationalized (but not necessarily overcome). The relationalization of cultural events aims to create a new temporary cultural situation with reference to a very specific transaction (ibid.).

In relation to culture, the transcultural learning model was developed within the research agenda of relational economics theory (see chapter five). As will be discussed in detail in chapter five, this model is a three-step process for identifying and developing existing and new cultural commonalities and thus promoting cooperation (Wieland 2019; Baumann Montecinos et al. 2019; Baumann Montecinos 2022). In the sense of organizational learning, cooperation is to be fostered by stakeholders who invest the resources in the organization. The model would facilitate the relationalization of cultural events. Heterogeneous stakeholders bring different rationalities to the transaction. Heterogeneity is meant here not only as national diversity, but in the sense of multiple rationalities and language games[20]. National diversity is only one element of cultural diversity. Other elements such as professional cultures, gender, generation (for individuals) sectors, dimention (for collective actors), to name but a few, influence diversity. Moreover, single stakeholders themselves are not homogeneous, but consist of cultural events (Wieland 2020a). As for relational transactions, these would not then be influenced by "the cultural actors", but by "the totality of culture" (Wieland 2020a: 113). In this framework, transcultural learning should create the conditions for the relationalization of polyvalent events to enable specific multicontextual transactions and thereby increase organizational ability to deal with polycontextuality, polycontextuality and polylinguality. While single rationalities would regard single stakeholders (individual or organizations) and therefore refers to stakeholders´ management, the relationalization of rationalities for conducting organizational transactions may foster structure formation at organizational level. In this way, it would not be a stakeholder management process, but a process that would regard the organizational entity per se.

As for the findings of the literature review on organizational learning, heterogeneity (different rationalities) was described either as a resource or as a barrier to the organizational learning process (see chapter two). From the perspective of relational economics and transcultural learning, there is no learning without heterogeneity in the sense of polycontextuality, polycontexturality and polylinguality. The question would not be whether

[20] Traditional inter-cultural approaches have focused on national diversity, on the classification of traits of different nationalities (Germans are like that, Italians like that, etc.) (e.g., Hofstede 1984; Hofstede al. 2002; Trompenaars & Hampden-Turner 1997).

heterogeneity blocks or promotes learning, but rather how to identify and develop mechanisms for relationalizing multiple rationalities and language games.

3. Conceptual Connections and Changes Between Existing Organizational Learning Literature and Organizational Learning in Relational Economics Terms

Conceptual connections and changes result from a conceptual analysis. The latter aims at elucidating notions, thereby improving the grasp of the notion one seeks to express (Olsthoorn 2017). There are different forms of conceptual analysis (Olsthoorn 2017). In this research, conceptual analysis has two main objectives:

1. Exploring conceptual connections between different concepts: In this case, the conceptual connections between the concept of learning as advanced in the existing literature on organizational learning and the concept of learning as relationalization of multiple rationalities.
2. Studying conceptual changes: In this case, conceptual changes between the concept of learning as elaborated in the existing literature on organizational learning and the concept of learning as relationalization of multiple rationalities.

After presenting the state of the art of the literature on organizational learning and discussing its implications within the theoretical framework of relational economics, the conceptual analysis aims to be the last step in answering research question a, namely:

> To what extent do existing organizational learning theories support the definition of organizational learning as a process for the relationalizing of rationalities for enabling the completion of multi-contextual transactions in the context of organizations intended as entities in their own right?

In the following elaborations it is argued that the answer to research question a. is neither a qualified yes nor a qualified no, but rather somewhere inbetween. This is because there are some elaborations in the existing organizational learning literature that may lay the foundations for some conceptual connections between existing theories of organitational learning and organizational learning as conceptualized here. This is, for instance, the case of the elaborations in the modern stream of organizational learning literature and especially on the concept of network as learner. The latter lays the foundations for conceptualizing organizational learning as learning by the entity that considers both the intra- and the inter-organizational context. This would allow the nexus of stakeholders to be seen as learners. Organizational learning would take into account the "complex arrays" of relations (Holmqvist 2003) in the "complete learning system" (Wiewiora et al. 2020).

Organizational learning as learning by the entity may find a conceptual connection to the elaborations by Cook and Yanow (1993), too, and their call to see the organization as cultural entity rather than a cognitive system. Cook and Yanow contributed to distinguishing individual learning within the organization from learning by the entity, thereby providing a theoretical basis for defining organizational learning as a different phenomenon from individual learning in organizations. In particular, Cook & Yanow's (ibid.) elaboration can offer insights into organizational learning as a micro-meso relational process. Micro-meso means that, on the one hand, it is accepted that stakeholders who invest resources are part of the learning process. On the other hand, the organization is an entity in its own right (or "cultural entity" to use the terminology of Cook & Yanow). Drawing on Tomasello (2019), the learning process in Cook and Yanow´s sense does not refer to "I" or "you", but to the joint agent "we", i.e., to the organizational entity itself. The further elaborations on the necessity to distinguish learning in the organization from learning by the organization (Poper & Lipshitz 1998) also represented an important contribution to defining organizational learning as learning by the entity in its own right. Despite these relevant contributions by scholars in the 90s, the literature review highlighted how this debate has not been the focus of study in more recent literature.

A conceptual contribution of the research at hand in its attempts to provide a deeper analysis of the nature of organizational learning as learning by the organization would be a contribution to overcoming the existing theoretical limitations in organizational learning in terms of antropomorphization. Another added value to the theoretical debate would be a contribution to the conceptual distinction between individual learning within the organization and organizational learning by the organization. The conceptual shift from learning within the organization to learning by the organization would imply a shift from the concept of interpersonal relationship within the organization to relational intended as relationalization of multiple rationalities. The implications for the conceptualization of organizational relational learning within the framework of relational economics are that organizational learning would not be (only) about putting individuals into relationships, but rather about relationalizing multiple rationalities. This is not to argue that interpersonal relationships in the context of organizations would not be relevant, but rather to focus on the relationalization of their different rationalities.

It has been argued that the role of individual learning theories is also connected to the nature of organization in existing organizational learning literature. Classic and neoclassic organizational theories (for instance Weber 1904/2005; Taylor 1919; Selznick 1948; Simon 1947/1976; Cyert & March 1963; Galbraith 1974) consider the organization as a group of internal workforces. The most important contributions of these influential scholars concerned the division of labour (Weber 1904/2005; Taylor 1919), the social aspect to foster productivity of employees (Mayo 1945), the coordination of employees (Selznick 1948) and the decision-making logic within the organization (Simon 1947/1976; Cyert & March 1963; Galbraith 1974). When the organization is conceptualized as a nexus of stakeholders´ resources, the organization is no longer simply a group of internal workforces. While employees, owners, etc. are part of the nexus, it also includes all other possible stakeholders. Therefore, in order to conceptualize learning within the framework of relational economics, a fundamental conceptual change regards the nature of the organization from organization as a group of employees to organization as a nexus of stakeholders´ resources. If the organization is understood as a nexus of stakeholders´ resources located both within and outside institutional boundaries, organizational learning would extend beyond the institutional boundaries of the organization. Conceptualizing organizational learning within the framework of relational economics theory would therefore require that organizational learning be viewed as both an intra- and inter-organizational phenomenon. Such a conceptualization would be a step towards the integration of intra- and inter-organizational learning, thus overcoming the "either-or" approach that characterises the literature on intra- and inter-organizational learning (Beeby & Booth 2000; Holmqvist 2003). With a "both/and" approach, i.e., organizational learning as both an intra- and inter-organizational phenomenon, the complete learning system (Wiewora et al. 2020) would be considered.

Although the network as a learner has already been elaborated in the literature and indeed constitutes a conceptual connection to organizational learning within the framework of relational economics, many contributions to the inter-organizational literature (also network learning) still view the phenomenon of learning as an intra-organizational phenomenon (see chapter two). In this view, stakeholders outside the organizations, although located within the organizational network, are a source of external pressure. Viewing the organization as a nexus of stakeholders implies that the environment is endogenized, although stakeholders remain operationally separate (see 2.4 in this chapter).

These necessary conceptual changes to conceptualize organizational learning in the theoretical framework of relational economics can be summarized into one main change: The need for a methodological change, from methodological individualism to methodological relationalism. Organizational learning in the mainstream of organizational learning literature has been conceptualized in terms of employees, i.e., as components of the social system of the organization. In this sense, the mainstream of organizational learning is methodological individualism. This conceptually justified applying individual learning theories to conceptualize organizational learning. Conceptualizing organizational learning as relationalizing multiple rationalities would shift the focus from the parts of the organizational social system to the relation between the parts and between the system and its parts (shift towards relationalism).

Due to the central importance of a methodological change for the conceptualization of organizational learning in the framework of relational economics, the topic will be discussed in detail in the next chapter.

Chapter Four

Methodological Change: A Relational Reconceptualization of Organizational Learning

> "A social scientist who wants to stay up to date needs methodological studies, through which constantly to refine one´s conceptual toolset – making sure that one´s concept stays readily operationalizable in respect of solving the most topical social scientific research problems within the relevant frame of reference." (Kivinen & Piiroinen 2006: 321)

1. From Methodological Individualism to Methodological Relationism

1.1 Meta-constructs: Individualism, Holism and Relationism

With the aim of conceptualizing organizational learning within the framework of relational economics theory, the following elaborates on relationism as a meta-theoretical basis for a theory of organizational learning. The aim of this chapter is not to provide a comprehensive literature review of theoretical meta-constructs. Rather, it aims to work out why existing organizational learning theories are situated within the theoretical meta-construct of individualism and what implications for organizational learning a shift from methodological individualism to methodological relationism would entail. For the sake of this goal, the literature included in this chapter refers to the work of some scholars who have contributed to defining the different meta-constructs conceptually and to elaborating differences between the different meta-constructs.

Methodological individualism (also called atomism) and methodological holism (also called collectivism) are the two main meta-constructs discussed in the literature. In methodological individualism, social phenomena are explained and defined in terms of the components of social systems (e.g., Ho & Chiu 1998; Ritzer & Gindoff 1992; Subasi 2020). These components constitute the unit of analysis of social systems (Bunge 2000). In methodological holism, social phenomena are explained and defined from the whole. The whole is a system of parts that cannot be decomposed into elements (Overton 2013). Social phenomena are independent of their elements. The focus is on the structures (Bunge 2000). Methodological relationism - also called systemism (Bunge 2000) - emerged as an alternative to these two main meta-constructs[21].

In terms of the conceptual connection between relationism and the other two meta-constructs, Overton (2013) argues that holism is central to relationism, while other scholars make a clear distinction between the constructs. For Ho & Chiu (1998), methodological relationism is an alternative conceptual framework. In relationism, social phenomena are composed of relations (Subasi 2020). Ritzer & Gindoff (1992) argue that methodological relationism contains elements of individualism and holism. According to the scholars (ibid.), individualism and holism represent two poles: The former reduces social phenomena to their components; the latter starts from the whole (or systems), which cannot be explained by the parts of the whole (ibid.). As for relationism, while on the one hand it accepts that social wholes are made up of elements (e.g., employees in an organization), it also accepts that the whole is more than the sum of its parts (e.g., the organization is more than its employees – or in general of its stakeholders´ resources). Accordingly, to understand social phenomena, it would be necessary to look not only at elements or the whole, but at the relations within and between different levels (micro-meso-macro) (Ritzer & Gindoff 1992; Bunge 2000; Subasi 2020)[22]. A relationalism construct would thereby define relationalization between the parts and between the parts and the whole (Overton 2013). Methodological relationalism would be located on a continuum between micro and macro levels (Emirbayer 1997), between the two poles of individualism and holism (Ritzer & Gindoff 1992) (Figure 7).

[21] According to Kivinen and Piiroinen (2006), there are two opposing ways to understand relationism: Philosophizing sociology and socializing philosophy. For an overview of these two opposing ways see Kivinen & Piiroinen (2006).

[22] For a distinction and literature overview of methodological relationism, methodological individualism and methodological holism, see Ritzer & Gindoff (1992).

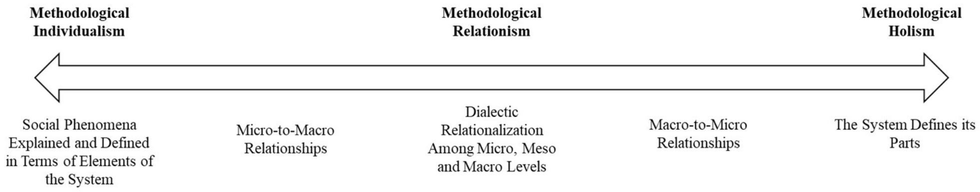

Figure 7: Methodological Individualism, Holism and Relationism. Source: Own illustration based on Ritzer & Gindoff (1992).

Relationism does not neglect the parts of the system, but takes into account the dialectical relationalization between micro, meso and macro levels. According to this view, relationism would thus not replace individualism and holism, but extend them. System´s elements still have a place in methodological relationism because they are embedded in social networks (Ho & Chiu 1998), where the unit of analysis is not the nodes but the links between nodes[23].

In the theory of relational economics, stakeholders invest resources in the organizational transactions (micro level) and use the organization (meso level) to carry out these transactions. Transactions attract events from the environment (macro level). Events that are then relationalized change the nature of the transaction (Wieland 2022). The following figure shows an example of the relationalization of micro, meso and macro levels.

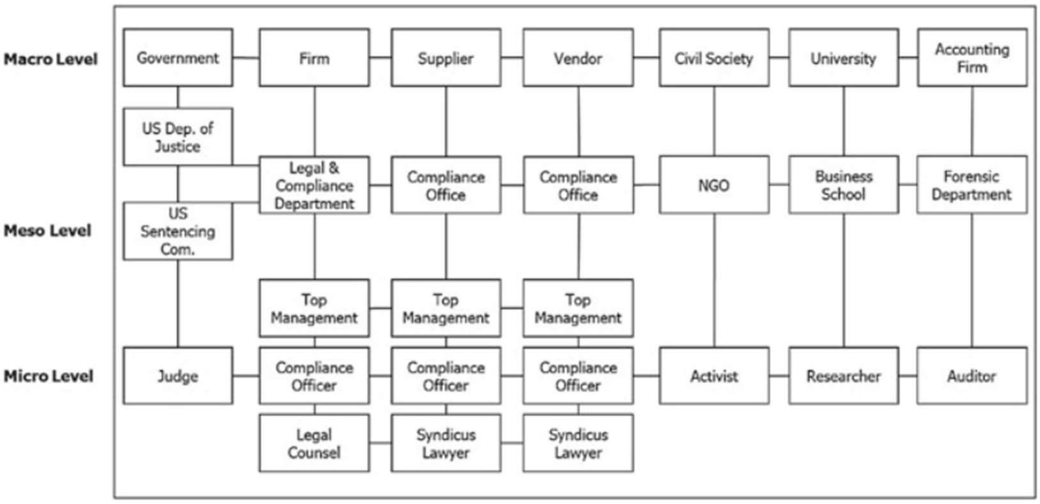

Figure 8: Example of Micro-Meso-Macro Level Relationalization. Source: Wieland 2022: 32.[24]

[23] In the theoretical framework of General Systems Theory, Janev (2020) proposes the relation – and not the element – as basis entity of the system.

[24] This figure refers to the FCPA example discussed in the previous chapter.

1.2 Substantialism and Relationism

The structures-components, society-agency dichotomy in the literature on individualism, holism and relationalism is related to the debate on substantialism and relationalism (e.g., Emirbayer 1997; Selg & Ventsel 2020; Selg et al. 2022). Whereas in substantialism, static substances have primacy, in relationalism dynamic, continuous and unfolding relations have primacy (ibid.). Substantialism can be conceptually divided into two approaches: Self-action and inter-action (Emirbayer 1997; Selg & Vetsel 2020; Selg et al. 2022). Both methodological individualism and holism belong to substantialism-self-action (ibid.). Holism belongs to substantialist self-action insofar as it postulates self-subsistent wholes (society, nations, cultures, organizations, etc.) (ibid.). While methodological individualism postulates individual entities as the source of actions, methodological holism postulates social systems as the source of actions (Selg & Vetsen 2020). In holism, social systems are actually self-acting entities (ibid.).

The second approach is the "inter-action" approach. This approach focuses on the interconnection between substances that nevertheless remain fixed, unchanged and independent (Emirbayer 1997; Selg & Vetsen 2020; Selg et al. 2022). Actions take place between or among entities (Selg & Vetsen 2020).

Relationism would imply the perspective of transactions (Emirbayer 1997; Selg & Vetsel 2020; Selg et al. 2022). The unit of analysis shifts from the substance (or elements) to the transactions. The latter are defined as dynamic unfolding processes. While elements are inseparable from the transactions in which they are involved, wholes (society, organization, cultures, etc.) are "empty abstractions" without elements (Emirbayer 1997). They can be considered separately, but not as being separate (Selg & Vetsel 2020, Selg et al. 2022). Relationism postulates the primacy of the process (ibid.).

The difference between transactional and interactional approaches is that the former does not postulate relations between static and inert substances that remain unchanged. Rather, it is a dynamic, unfolding process that changes the elements. Emirbayer describes the process as a "complex joint activity, in which it makes no sense to envision constituent elements apart from the flow within which they are involved" (Emirbayer 1997: 289). The elements involved in complex joint activities create "changing patterns" (ibid). Social phenomena are redefined in the relation itself (ibid.). The conceptual primacy is on the relation itself, not on the elements involved in it (Selg et al. 2022). Selg & Vetsel define the relation in the transactional approach as constitutive relations. The latter means that “the entities are constituted within relations” (2020: 20), in the sense that, without the relation, the entities would not exist. The transactional approach presupposes a world consisting of transactions (Selg et al. 2022). The latter are therefore the unit of analysis of social phenomena (ibid.).

Self-action and inter-action approaches are also about social relations. The difference lies in the meaning and function of the relation compared to the transactional approach (Selg & Vetsel 2020). Whereas in the former the relation involves static substances that remain unchanged and independent, in the transactional approach the prefix trans means that the action transcends entities (Selg & Vetsel 2020). This means that in the relational approach the relations transcend the entities and are “reciprocal, multi-polar, interdependent and processual” (Selg & Vetsel 2020: 18).

Transcendental relation has been further conceptualized by von Eschenbach (2021). The starting point for the conceptualization was the determination of the elements of a relation (*Beziehung*) (ibid.):

- Relata: Substance (individual, thing, object)
- Relationship (*Bezogenheit*): Relationship between substances/relata
- Connection (*Verbund*): Nexus

Based on the elements of relation, von Eschenbach (2021) has highlighted three types of relations:

- External Relation (*Außere Beziehung*): In the external relationship, the relata is the primacy of the relation. The focus (or priority) is on the relata (substance) that is stable. In the relationship, the two (or more) relata involved remain separate and isolated substances. In this sense, the relation is external to the relata (substance relation - *Substanzrelation*). The result is the “hypostasis of the relation” and the “absolutisation of the relata”. Drawing on Schaaf, von Eschenbach defines this as the “objectification” of the relation. External relation would be coherent with the meta-construct of methodological individualism, in which the focus is on the elements of a social system.
- Inner Relation (*Innere Beziehung*): In inner relation the relata are neglected. The focus (or the priority) is on the relationship between substances. Relationship is the “generating source” of all relata, i.e., the relata is generated by relationship. The totality of the relationship eliminates the independence and the self-existence of the relata (pan-relational). The absolutisation of the relationship leads to a loss of the

relata. Inner relation would be coherent with the meta-construct of methodological holism, in which the focus is on the whole system and its elements are neglected.

- Transcendental Relation (*Transzendentale Beziehung):* In the Transcendental Relation all three elements of the relation are considered (relata, relationship and their connection (*verbund*)). The primacy of the relata over relationship or vice-versa is not established[25]. In transcendental relation the connection (*verbund*) is also of relevance. In Transcendental Relation, substances (relata) are no longer stable, but transform and change. Von Eschenbach (2021) focuses on the plasticity and flexibility of relata. He draws on Heraklit´s principle of "reciprocity" (*Gegenwendigkeit*) and coined the term "mutual transformation" (*Gegenwendiger Anverwandlung*). The relata in the relationship transform and change themselves. It is a mutual and reciprocal transformation in the constellation of the relation. The transformation is itself the relational process and the shape (*gestalt*) of the parts that are substantially transformed in the relational process depends on the quality of the relation. Bearing Selg et al. (2022) in mind, the relation would neither be external nor inner, but constitutive. Transcendental relation would be coherent with the meta-construct of methodological relationism, in which the focus is on the relation between the parts.

The concept of mutual transformation has also been analysed by Santos (2015). The scholar elaborates on the "relational-transformational emergence". The latter is conceptualized as transformation of the relata resulted by the relation among relata that generates the whole system. The mutual transformation in von Eschenbach's sense is elaborated by Santos (2015) in the sense of a continuous relational construction in which relata transform and co-evolve in systems of relationalization.

[25] While Selg & Vetsel (2020) highlight the primacy of the relation over entities, von Eschenbach does not establish a primacy of relation over relata. In a similar way, Santos (2015), too, rejects such primacy. Both relation and entities are a constituent part of a relational thinking, as entities are in relation and mutually change each other.

1.3 Brief Overview of the Ontological Implications of Different Meta-Constructs

Many scholars concerned with theoretical meta-constructs emphasize the ontological views implied by holism, relationism, individualism. The detailed debates on ontology would require extensive philosophical elaboration. This task would be valuable but beyond the scope of this dissertation. Instead of a comprehensive overview of the ontology of the different meta-constructs, a brief and non-exhaustive overview of the debate is provided here. The focus is on the distinction between the ontological commitments with a focus on relational ontology[26]. The aim is to further the completeness of the elaboration of the distinction between the meta-constructs and to clarify the implications for organization and organizational learning[27].

Ritzer & Gindoff (1992) distinguish between ontological and epistemological individualism. In the former, only individuals are real and social reality is the result of human actions. In the latter, what is known derives from knowledge about individuals. As for holism, Ho & Chiu (1998) point out the methodological issues of an "ontological commitment to the existence of the group mind, or superhuman agents engaged in the direction of human affairs but operating independently of human minds" (Ho & Chiu 1998: 353f.). These scholars argue there is no need for positing group minds of superhuman agents, but rather to see the phenomenon as collective phenomenon in its nature. As for relationism, since it takes into consideration the relation between different levels, it acknowledges the ontology of the components of the system and of the system as a whole, namely both components and system are ontologically real and therefore exist as two distinct entities (Subasi 2020). In this way, according to Subasi (2020), the shortcomings of individualism and holism ontologies are avoided. On this point, Wildman (2006) elaborates on holistic and substantivist ontologies and defines both as "one-sided strategies". In the former, relations are ontologically prioritized; in the latter, entities are ontologically prioritized (ibid: 56). The scholar then proposed a casual theory of relation that theorizes both entities and relations as ontologically real[28]. In a similar vein, Santos (2015) rejects both the

[26] Rendtorff (2021) argues that relational economics follows a relational ontology.

[27] This brief literature review, for instance, does not consider the philosophical debate on the distinction between relational and constituent ontologies (on this point, for instance, van Inwagen 2011; Yang 2018).

[28] The scholars recognized that there are already contributions in the literature to a theory of casual relation. In particular, Wildman (2006) mentions five existing theories of casual

ontological priority of entities over relation and the ontological priority of relation over entities, since relata and relation form an ontological dialectic unity. The latter means that reality is explained neither by components of the system, nor by the system as whole, but by the relational-transformational emergence that transforms the components and constructs the whole (ibid.). Overton (2013) emphasizes an ontology of becoming and an inclusive epistemology in the sense that includes both knowing and known as complementary in the nature of knowledge. In their two opposing ways to understand relationism, namely philosophizing sociology and socializing philosophy, Kivinen & Piiroinen (2006) identify different ontological commitments. While philosophizing sociology is based on ontological commitments, socializing philosophy is not based on a priori ontology. The scholars propose a methodological relationism drawn from pragmatism, thus, getting rid of ontological and epistemological a priori commitments thereby avoiding the ontological individualism-holism debate. There are nevertheless critics of this lack of ontological concern in sociology (e.g., Aspers 2010).

Breaking away from ontological and epistemological commitments as suggested by Kivinen & Piiroinen (2006) would probably facilitate the elaborations in the present research. Rather, this research argues that a shift from methodological individualism to methodological relationism in organizational learning would imply a shift in the ontology of the organization. As an entity in its own right, the organization would be an ontological reality and not merely an aggregate of its stakeholders´ resources. The organization would be an entity existing in its relations, a nexus in the relationalization of transactions. This does not preclude the organization's stakeholders´ resources from also being ontologically real. They exist as separate ontological entities.

2. *Theoretical Implications for Organization and Organizational Learning*

2.1 *Organization and Organizational Learning within the Meta-Construct of Relationism*

As discussed in the literature review (chapter two), many existing theories and models of organizational learning define organizational learning as an

relation: Participation metaphysics (Plato), pratitya-samupada metaphysics (Mahayana Buddhist philosophy), process metaphysics (Whitehead), semiosis metaphysics (Peirce), implicate-order metaphysics (Bohm) (Wildman 2006).

extension of individual learning. Many scholars rely on cognitivist and behavioural learning theories to conceptualize and explain organizational learning. Employees are central to the conceptualization of organizational learning in the existing theories. In this way, these theories and models are embedded in the meta-construct of methodological individualism. In the same way, many organizational theories are methodologically individualist. Explicitly drawing on Emirbayer, Scott & Davis (2016) place many rational and natural theories on organization, like the works of Weber, Simon and March, as substantialist self-action definitions of organizations. The scholars also highlighted that the existing elaborations on organization as open systems are still substantialist. The difference between the rational and natural and the open system definitions of organizations is that the former is substantialist self-action and the latter substantialist inter-action, remaining individualist and substantialist. In this way, even many scholars of organization as open systems have not really embraced an open system view of organization, since they still maintain closed-system assumptions (ibid.). These assumptions are: "(1) organizations are strongly bounded, (2) stability is essential within this boundary, and (3) organizational form is primarily a consequence of managerial decision making" (Bidwell & Kasarda 1985: 1-2, as quoted by Scott & Davis 2016: 386). Organizational learning theories focused on the role of individuals as agents of organizational learning process, on the other hand, it also presupposes organizational learning as a self-acting process (Elkjaer 2003).

In general, in methodological individualism, organizational learning (a social phenomenon) would be defined in terms of the components of the organization (employees, stakeholders or stakeholders´ resources in general). In methodological holism organizational learning would imply defining learning independently of organizational stakeholders. In this case, organizational learning would be a self-governing process and stakeholders who invest resources would be neglected in the learning process. Within the meta-construct of relationism, stakeholders´ resources are relata, whose nexus form the organization (entity in its own right). The shift from methodological individualism to methodological relationism would then mean that the stakeholders invest resources (*relata*) in the nexus (*verbund*) for conducting transactions (*relationship*). The organization is the nexus (*verbund*). It is a corporate actor (entity in its own right) which gathers the resources and interests of multiple principals (or stakeholders) (Coleman 1994).

Even if a mere intra-organizational perspective would be considered, methodological relationism may still work. Indeed, in the organization intended as institutional boundaries (such as in many existing organizational learning literature) there is a structure of positions in the organization that exists independently of the employees who occupy those positions (Coleman 1994). In the organization, positions are in relation, not persons (ibid.). Coleman pointed out that “the interaction among individuals is seen to result in emergent phenomena at the system level, that is, phenomena that were neither intended nor predicted by the individuals” (Coleman 1994: 5). Organizational learning may be an example of such a phenomenon. It would not be intended or predicted by single individuals (or stakeholders, or resources). Nevertheless, bearing in mind Wildman´s casual relation theory (2006), although phenomena may not be intended or predicted by the components of the system (stakeholders´ resources), an organization may achieve its goals because of the way the stakeholders´ resources (both from stakeholder inside and outside the institutional boundaries) are put in relation in transactions (micro-meso relation).

2.2 From Cognitive to a Relational Learning Process

In the shift from cognitive to relational, organizational learning would not be conceptualized in cognitive terms. Organizational learning within the framework of relationalism would not be a cognitive process insofar as the organization as a social unit lacks a brain and consequently cannot think (Bunge 2000). By contrast, people can think and therefore cognitive learning can only concern individuals. Organizational learning in the meta-construct of relationalism does not presuppose the existence of an organizational mind. To use Ho & Chiu's (1998) terminology, the organization is not considered a superhuman agent. The organization is rather conceptualized as a governance structure to conduct transactions among stakeholders who invest resources. In this sense, organizational learning would be a poly-dimensional relation (Schramm 2022): On the one hand, the organization represents the complex whole. This complex whole is what learns. On the other hand, this complex whole is composed of basic elements (transactions conducted by the various stakeholders in the nexus). Organization in this sense is the bigger formation, intended as a more complex and lasting thing (Schramm 2022)[29].

[29] In the terminology of the philosophy of Whitehead (1929), the big formation is called “society”.

In this research, organizational learning is defined as a relational process for the relationalization of multiple rationalities. Rationalities are brought to the transaction by multiple stakeholders and should be relationalized to enable continuative cooperative relations (Wieland 2020a; Wieland 2022). Organizational learning, bearing Emirbayer (1997) in mind, can be defined as a "complex joint activity" which goes through the relationalization of rationalities brought to the transaction by stakeholders.

Organizational learning not being a cognitive process also means that if, on the one hand, it is accepted that organizations can learn (organizational learning is therefore not a mere metaphor), on the other hand it is also accepted that organizations lack a brain. In short, it would be a relational but not a cognitive process. To clarify this point, Michael Schramm´s categories of big formations (or societies) may be useful. Drawing on Hartshorne, the two categories of societies are (ibid: 265):

- Mere aggregates
- Compounded individuals

The difference between the two types is that the second includes a central nervous system. According to this definition, the organization is an aggregate in the sense that the organization as such does not have a brain. As entity withouh a brain, organizational learning cannot be cognitive (avoiding antropormophization). Like machine learning (see discussion in the previous chapter), organizational learning, too, would be a learning process beyond human cognition.

2.3 From Substantialism to Relationism

Organizational learning as a relational process may also require overcoming a substantialist view of organization and organizational learning. Specifically, in this study, organizational learning is not defined in terms of substantialism, i.e., not static, but a continuously unfolding process. In organizational learning as a relational process organization and stakeholders´ resources are in what Selg & Vetsel (2020) define a constitutive relation: Stakeholders have resources to invest in the organization and thereby conduct organizational transactions, the organization provides the governance structure because there are transactions to be conducted. Bearing Selg & Vetsel (2020) in mind, although stakeholders´

resources and the organization can be considered separately, they are not separate. Figure 9 schematizes this constitutive relation as a micro-meso relation.

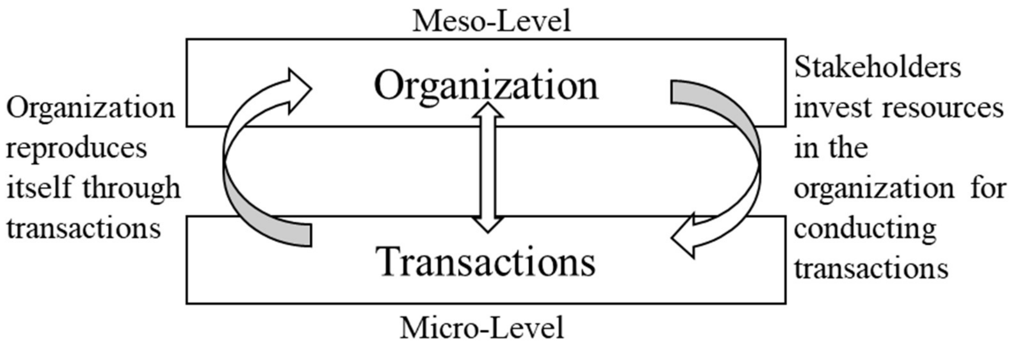

Figure 9: Organizational Learning as Constitutive Micro-Meso Relationalization. Source: Own illustration.

The figure depicts the continuous dialectic micro-meso level relationalization. The organization represents the meso-level, namely the big formation that reproduces itself through transactions. Transactions represent the micro-level, namely the basic elements of which the organization is composed. Transactions are conducted because stakeholders invest their resources. This is a view of organizational learning that emphasizes processes over structures. This is not to say that there is no structure, but structures are created and recreated through organizational process. This is what Wieland (2022) calls the process of structure formation.

Figure 9 helps to elucidate organizational learning as a process of relationalizing multiple rationalities that are brought into the transaction. The stakeholders who invest the resources bring multiple rationalities that need to be relationalized for transactions to be executed. The relationalization of multiple rationalities is not for the sake of relationalization, but to enable transactions. This relationalization at the organizational level is a process of structure formation. Structure formation, in turn, refers to the continuous reorganization of the governance structure (organization). This process of continuous reorganization enables the organization to continue performing transactions and thereby learning (how to create value and survive in the long run).

In her "third way" of organizational learning Elkjaer (2003) also proposes a transactional approach towards organizational learning. In her work, transactional would mean a relation between individuals and environment (ibid.), which here is defined as a micro-meso relationalization. In her view, organization and individuals cannot be separated, or to use the terminology of this thesis, they are in a constitutive relation (Selg & Vetsel 2020). The "third way" nevertheless requires "thinking" and "reflection" (Elkjaer 2003) (human characteristics) as methods of organizational learning, which lead to anthropomorphisms. Moreover, Elkjaer defines organization as "social world", which is not clear whether this social world would be ontologically real or whether only individuals capable of thinking and reflecting would be ontologically real. Unlike Elkjaer's work, the research at hand argues that the transactional approach would require a methodological shift in organizational learning studies and bases this argument in the literature on theoretical meta-construct. This research is also based on the nature of organization as a nexus of stakeholders´ resources and not as a social world, and defines learning as a process for the relationalization of multiple rationalities.

What remains open at this point is how to operationalize organizational learning as a relationalization of the multiple rationales brought by stakeholders in transactions. The following chapters address the operationalization of the concepts discussed.

Chapter Five

Transcultural Learning as a Model for Relationalizating Multiple Rationalities

1. Operationalization of Relational Learning in Organizations

Chapters two, three and four attempt to provide an answer to sub-research question a posed in chapter one. This sub-question relates to the extent to which existing organizational learning theories and models support the concept of organizational learning as the relationalization of multiple rationalities for performing transactions. After presenting a literature review on existing organizational learning literature (Chapter two) and discussing the implications of the literature review in the light of relational economics (Chapter three), it was argued that the answer to sub-research question a is neither a qualified yes, nor a qualified no. This means that although some concepts in the existing literature may provide insights into the definition of organizational learning as conceptualized in the research at hand, some conceptual changes would be required (see elaborations in chapter three). It has been argued that the conceptual changes discussed in chapter three would be linked to an important necessary change: A methodological shift from individualism to relationism. Chapter four elaborates on this methodological shift and what it means for the organization and organizational learning. As stated at the end of the previous chapter, there is a need at this point to elaborate on the operationalization of these concepts at the organizational level. This chapter is dedicated to this operationalization. In particular, the role of the transcultural learning model (TLM) in operationalizing multiple rationalities in the organizational context (sub-research question b - see chapter one) is discussed.

2. Conceptual Elucidations on Transcultural Learning as a Model for Relationalizating Multiple Rationalities

2.1 Defining Transculturality as Applied in this Research

To understand the TLM and its appropriateness as a model for the operationalization of organizational learning as conceptualized in this research it is necessary first and foremost to understand what is meant by transculturality in the model. The term transculturality has many meanings and is often used interchangeably with other terms such as interculturality and multiculturality, which can hinder terminological accuracy (for an overview of the topic see Bolten 2020).

As in all areas of scientific literature, terminologies play a central role as different terms can denote different phenomena (Antor 2020). Interculturalism is perhaps the best-known term. The origin of the term lies in the Herderian view of culture (Welsh 2001). This view led to comparative and structural research, which aims to enable or promote dialogue between different cultures through compromise and the reconciliation of differences (e.g., the studies of Hofstede 1984; Hofstede al. 2002; Minkov & Hofstede 2013; Trompenaars & Hampden-Turner 1997).

Rather, multiculturalism refers to the sharing of social space between different cultures and, like interculturalism, focuses on cultural differences (Bolten 2020). Transculturalism probably has its roots in the work of José Marti and Fernando Ortiz, especially in their work on "transculturación", intended as the transition process of moving between cultures (Fisher & Wieland 2018; Bolten 2020). Transculturality is thus to be understood as "beyond" cultures. Welsh ascribes a similar meaning to transculturality, emphasizing that "'trans' has the meaning 'transversal'(…). So, whilst having the meaning of transversal (…), 'trans' has the sense of 'beyond'" (2001: 67).

Bolten (2020) associates Ortiz's work on transculturality with "post national thinking" and thus with an attempt to overcome the container view of culture (an attempt that can also be attributed to the work of Welsh). At first glance, "post national thinking" may be associated with universalism and pan-culturalism (for an overview of pan-culturalism, see Antweiler 2015). However, going beyond culture as a national affiliation does not necessarily imply homologation. Universalism and pan-culturalism claim that people belong to a community and share some commonalities (Antweiler 2015). Although this assertion may be true, at least on a thin level (Walzer 1994; Appiah 2006), it has been argued that belonging to a community does not mean the complete dissolution of differences (Allport 1954; Walzer 1994; Appiah 2006).

The concept of transculturality as applied in this research draws on the work of Josef Wieland (2016; 2019; 2020a) and Julika Baumann Montecinos (2019; 2022). For these scholars, the focus is on cultural factors in global value networks and the conditions for generating cooperation rents when conducting transactions (Wieland 2020a). As already discussed, in relational economics theory, transactions attract polyvalent events in the sense of different contexts (polycontextuality), logics (polycontexturality) and language games (polylinguality) (ibid.). Different social norms resulting from this polyvalence generate different expectations in relation to the specific transactions (ibid.). In relational economics theory, these social norms are generalized as cultural events (ibid.). Cultural events are to be relationalized but not necessarily overcome (ibid.). In contrast to intercultural research, the focus is not on overcoming differences, but on identifying and creating cultural commonalities to foster cooperation in the context of concrete transactions in pursuit of common goals (Wieland 2020a; Baumann Montecinos 2022). The statement that differences should not be overcome does not mean that differences are neglected, but rather that they should be relationalized. Accordingly, transculturality can also be defined as "a social process that requires productive management of differences" (Wieland 2019: 25). "Trans" thus takes on the meaning of a relationalization of differences that aims to create connections and build cultural bridges that can lead to new commonalities. Due to the temporal limitation of some transactions, such commonalities can also have a temporary dimension and therefore do not take on an absolute dimension. Accordingly, the success of collaborative transactions between culturally heterogeneous actors may require dealing with differences, but also the ability to find and develop commonalities (Baumann Montecinos et al. 2019; Baumann Montecinos 2019; Wieland 2020a).

This definition of transculturality implies a process orientation in contrast to the pan-cultural and universalistic structural orientation towards transculturality (Bolten 2020). Accordingly, transculturality would be neither about cultural identities, comparing national cultures, resolving cultural conflicts or dilemmas, nor identifying universal commonalities. Rather, it is about commonalities that can lead to a temporary "mini-society" (Wieland 2020a: 24) as the result of a "new cultural situation" associated with very specific temporal transactions

(Wieland 2020a: 111). In this sense, the commonalities do not have a universal but a relative meaning[30].

2.2 Transcultural Learning Model

The concepts of interculturality, multiculturalism and transculturality have also inspired the literature on learning. The concept of transcultural learning has gained prominence in academic debate in recent years. Some contributions to this debate are the works of Aldridge et al. (2014), Wulf (2010), Jurkova & Guo (2018), Smith (2020), Salvadori (1997), Pusch (2009), Lin (2012), Baumann Montecinos et al. (2021). None of them explicitly focused on transcultural learning in organizations.

These contributions include the transcultural learning model (TLM) by Wieland (2019) and Baumann Montecinos et al. (2019). The first version of the model (Figure 10) was published in 2019 (Wieland 2019; Baumann Montecinos et al. 2019) and further elaborated in 2022 (Baumann Montecinos 2022) (Figure 11).

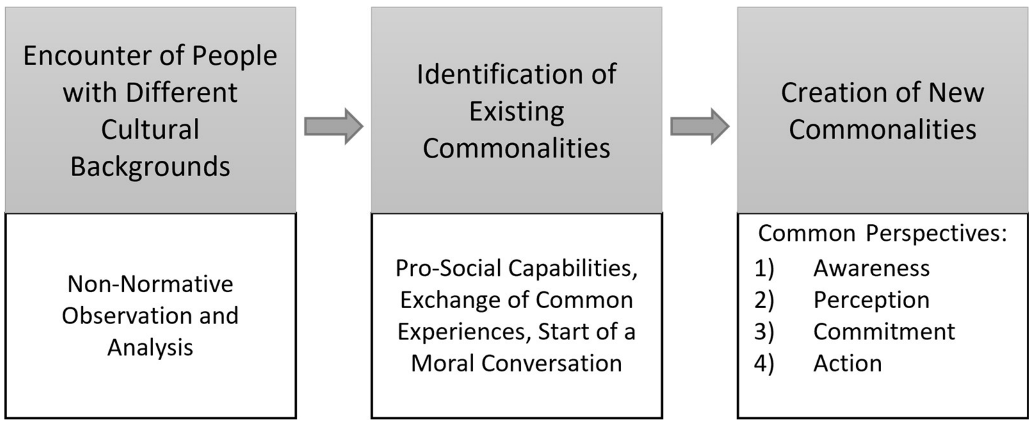

Figure 10: First Version of the Transcultural Learning Model. Source: Wieland (2019); Baumann Montecinos et al. (2019).

[30] To argue that the culture of the individual can be explained, let´s say, by its nationality would imply a holistic view of culture (the system explains its parts). With its focus on process and transactions, transculturality as conceptualized by Wieland and Baumann Montecinos can be intended as a relational view of culture.

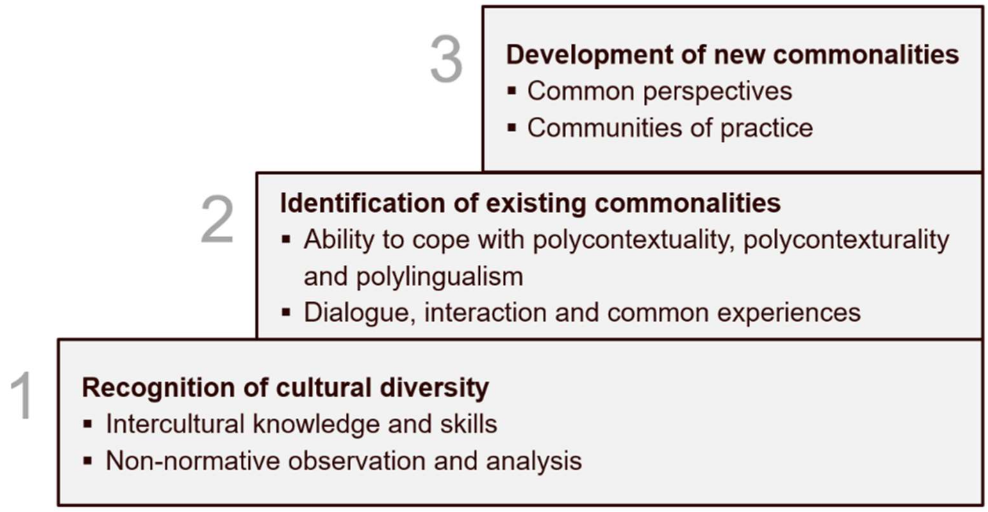

Figure 11: Updated Version of the Transcultural Learning Model. Source: Baumann Montecinos (2022).

The model combines management of cultural differences with commonalities in learning processes to exploit opportunities for cooperation between culturally heterogeneous actors. The first step in this model emphasizes that the encounter between actors with different cultural backgrounds requires non-normative observation and analysis, which is intended as the ability of the actors involved not to comment on and evaluate diversity as opposing categories. Intercultural knowledge and skills are also included in this first step, as diversity awareness still plays a role. The subsequent steps, identification and creation of existing and new commonalities, highlight the goal and outcome of the learning process, namely the identification and creation of existing and new commonalities among the actors involved in the process.

The ability of the elaborations on the transcultural learning model to schematize the process required to develop commonalities is undoubtedly one of the strengths of the model. In this sense, having highlighted cultural commonalities as the focus of transculturality, the researchers have also presented a model to explain how to develop commonalities. Despite these strengths, the model has not yet been conceptualized in relation to theories of organizational learning. Although elaborations of the model have not defined it as an organizational learning model, some empirical studies have focused on its implementation at the organizational level (Baumann Montecinos et al. 2019; Schwengber & Kindlein 2021), paving the way for further research on the applicability of the model in organizational contexts. Against this background, the present study aims to apply this model to the operationalization of organizational learning as conceptualized in the present study.

The suitability of the model for operationalizing organizational learning as conceptualized in this research is related to its elaborations on transcultural learning as a process of relationalizing rationalities brought into transactions by heterogeneous actors (in this research stakeholders investing resources in the organization) resulting from polycontextuality, polycontextuality and polylingualism.

2.3 Role of Culture in the Organizational Learning Literature Versus the Role of Culture in the Research at Hand

From the perspective of organizational learning theories, the concept of transculturality, interculturality or culture in general has not played a relevant role in the organizational learning literature (see literature review in chapter two). Although some scholars have emphasized the role of different perspectives and common goals for organizational learning (for instance Schein 1996; Easterby-Smith et al. 2000; Leonard & Straus 1998; Senge 2006), these aspects still play a minor role in the organizational learning literature.

The contributions in the organizational learning literature that deal with the role of culture point out that organizations are intrinsically culturally heterogeneous (see, e.g., the role of sub-cultures in Schein, 1996). The literature also distinguishes between culture introduced by different employees and stakeholders and organizational culture. While the former concerns the micro level (employees), the latter considers the meso level (the organization as a distinct entity with its own culture). Drawing on the previously presented definition of transculturality, stakeholders´ culture in the research at hand is an expression of different rationalities from different stakeholders who invest resources in the organization. For conducting transactions, these different rationalities require polycontextural management.

When defining the organization as a distinct entity, it is important to examine the characteristics that distinguish the entity from its components (stakeholders and their resources). As an entity in its own right, the organization has its own culture distinct from the employees´ (or stakeholders´) culture. On the culture of the organizational entity, Wieland (2020b) distinguishes between strong vs. weak and centralized vs. decentralized organizational cultures (ibid.: 28 ff.):

- Strong: Homogenization of cultural values and their interpretation

- Weak: Localization of culture values
- Centralized: Definition of organizational cultural policy by headquarters
- Decentralized: Autonomy of regions and areas belonging to the organization

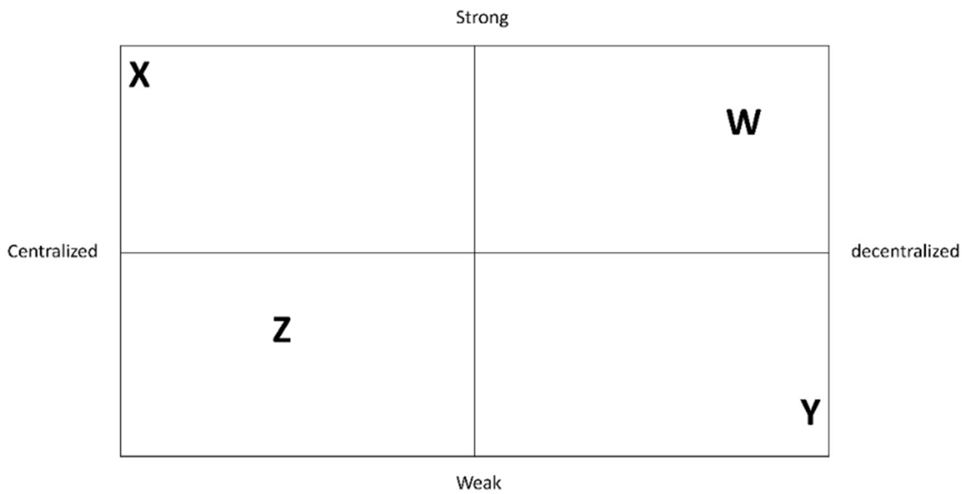

Figure 12: Organizational Culture. Source: Adapted from Wieland (2020b: 23).

Organizational culture can be the result of a combination of variables (see Figure 12). X and Y would be two extreme examples. An organization in position X would be characterized by a strong and centralized culture, i.e., a homogeneous organizational culture defined by a central headquarters. An organization in position Y would be characterized by a weak and decentralized culture, i.e., an organizational culture localized by autonomous regions or areas belonging to the organization. W and Z would represent hybrid positions. In Z, the organizational culture is defined by a central body, which would leave room for localization. In W, homogeneous organizational values are defined by local areas.

In the organization conceptualized as a nexus of stakeholders´resources beyond institutional boundaries, besides the culture of the single organization, the network itself may have its own culture. For fostering cooperative transactions within a nexus of stakeholders´ resources, a certain degree of decentralization in the culture would be required. As for strong and weak cultures, the degree of "strength" is related to the degree of heterogeneity. In a strong culture, homogenization of values would require similar views and common interpretation. The greater the heterogeneity, the greater the diversity of perspectives; the greater the need to leave room for local interpretations, the less strong the organizational culture should be to successfully conduct transactions that include resources from heterogeneous stakeholders. If the organization is inherently heterogeneous (at least at some level), then some degree of "weakness" in the culture is to be expected. It is important to stress that "weak" in this context does not have a negative meaning. A weak culture does not represent a weak organization. On the contrary, a weak culture would be one that leaves room for different perspectives and in this sense is open to the richness of diversity. In the light of this reasoning, a certain degree of decentralization and weakness in an organization conceived as a governance structure used by a group of heterogeneous stakeholders who invest resources to carry out transactions would facilitate the successful execution of transactions and enable the relationalization of different rationalities.

From the literature review, it has been found that the type of organizational culture does indeed influence organizational learning. The organizational culture indeed impacts on the atmosphere in the organization, which allows new capabilities to be developed (Chassagnon 2022). An appropriate organizational culture can facilitate learning (Argote & Miron-Spektor 2011). Argote and Miron-Spektor (ibid.) distinguished the learning context as being active or latent and argued that the latent context influences the active context. According to the researchers, organizational culture is included in the latent context. If the latent context influences learning, then it is a precondition for learning. Once positive preconditions at the latent context are created, learning is enabled or promoted.

In summary, when elaborating on culture in an organization, at least two types of culture should be considered: Stakeholders´ culture (micro-level) resulting from different rationalities, and culture as organizational culture. Both cultures are relevant for an organizational learning process as the relationalization of rationalities to conduct transactions. The organizational culture (meso-level) is relevant because it refers to the organizational entity and supports the concept of organization as an entity in its own right with its own culture that differs from its stakeholders´ culture. Furthermore, from a learning perspective, the literature shows that the organizational culture fosters organizational learning. On the other hand, for conducting transactions in organizational learning, the different rationalities (and cultures) brought by the stakeholders who invest resources (micro-level) should be considered. The discussed micro-meso relationalization process also considers the levels of culture.

The existing elaborations on the TLM refers to the micro-level, namely the stakeholders´ culture (or in general the actors´ culture). In organizational contexts, the relationalization of rationalities of different stakeholders requires common ground (Tomasello 2019), which are the desired outcomes of transcultural learning (in TLM the term commonalities is used). On the other hand, the success of relationalization is, in turn, facilitated by organizational culture (latent context). As mentioned earlier, organizations that have a certain degree of cultural weakness would particularly facilitate the process. Even though the TLM takes into account the culture of the stakeholders who invest resources, the model of transcultural learning conceived in organizational contexts can be seen also as a model for "weakening" organizational culture by being open to heterogeneity and thus facilitating the relationalization of rationalities. In this way, the TLM would contribute to understanding how a "complex joint activity" (bearing in mind Emirbayer 1997) involving the rationalities of different stakeholders who invest resource in transactions may lead to changes and learning at the organizational level (structure formation and continuous re-adaptation of governance structures).

Bearing in mind Tomasello (2019), at the organizational level it is not about stakeholder "I" or "you", but about the joint agent (organization) "we". This shift towards "we" would be coherent with the view of Cook & Yanow (1993) of organizations as a distinct cultural entity. In the organizational learning process, the focus would not be on the role of the individual employee (or stakeholder), the "I" or "you". The process would be about relationalizing the rationalities (cultures) of "I" and the "you", and the organization would be conceived as a nexus of stakeholders ("we"). Tomasello (2016) calls this the sense of "we-ness". In the pursuit of the common goals related to the transactions where the stakeholders invest their resources, "I" and "you" (different stakeholders) develop the aforementioned sense of "we-ness", which fosters a sense of belonging to the organization ("we"). This sense of "we-ness" leads to the emergence of a new and distinct joint agent (Tomasello 2009; 2016; 2019; Wieland 2019). This agent, distinct from the stakeholders and their resources, would be the organization (as an entity). The "we" (the organization) emerges when "I" and "you" (the stakeholders) develop sufficient common ground (Tomasello 1999; 2016; 2019). The transcultural learning model and its outcomes in the form of commonalities (common grounds) may contribute to explaining conceptually how the emergence of "we" comes about in organizations.

2.4 Transcultural Learning Model as a Form of Relational Governance

The TLM as a process for the relationalization of rationalities in the organizational context would be a form of relational governance through which relational spaces are created. The relational governance ensures the continuity of cooperative projects and entails different forms of governance depending on specific transactions (Wieland 2020a). In relational economics, relational governance "focuses on the ceaseless relationalization of events" (Wieland 2020a: 52). Drawing on Williamson, Chassagnon (2022) pointed to relational contracts as a relational governance mechanism. Relational contracts are defined as "informal agreements sustained by the value of future relationships" (Baker et al. 2002). Similarly, Wieland argues that "relational contracts are the predominant tool for shaping cooperative relations that continue over the timeframe t1…tn" (2020a: 29). Argyres et al. (2019) also highlights the connection between relational governance and relational contracts. In particular, the scholars highlight that relational governance keeps relational contracts "within its self-enforcing range" (ibid.: 225). Although the conceptual connection between relational governance and relational contract, a deep elaboration on the extensive literature of relational contracts would go beyond the scope of the research. This research is thus limited to elaborating on the TLM as a form of relational governance that enables the relationalization of rationalities and thereby the continuation of the organizational cooperative project.

Ferguson et al. (2005) conceptualize relational governance in terms of strong ties. In a similar way, Carmeli et al. (2021) elaborate on the concept of relational-based ties. Carmeli et al. (2021) propose the distinction between transactional-based and relational-based ties. The former are described as a distant, short-term connection characterized by a lower level of engagement. Relational-based ties, on the contrary, are described as closer, long-term connections characterized by a high level of commitment. Short ties can also be one-shot relationships – parties invest resources, meet and exchange, the transaction can be defined as a discrete transaction (Wieland 2020a). On the other hand, long-term closer ties based on commitment would require continuity and solid common ground among stakeholders in the nexus of resources.

While it cannot be precluded that some transactions may be discrete, the very nature of the organization as a nexus of stakeholders requires stakeholders to invest their resources in the expectation of a factor income plus a cooperation rent (Wieland 2020a). Discrete transactions can yield a return, but supra-normal profit in the form of a cooperation rent requires other conditions, such as the willingness and ability to cooperate successfully (Wieland 2020a). The former refers to the willingness to engage in long-term and mutually beneficial cooperation. The latter refers to the actual ability to cooperate successfully. At the organizational level, the willingness to cooperate is also manifested by a preference for continuity (ibid.). The latter may therefore require relational-based ties.

Carmeli et al. (2021) argued that while the literature provides studies and elaborations on the benefits of trustworthy, committed and collaborative ties, little is known about how these ties can be developed. Therefore, they proposed a theoretical model to explain how to transform transaction-based ties into relational-based ties. The model is based on three relational mechanisms, namely respectful engagement, communication and advice seeking and giving (ibid.). According to the authors, the first mechanism would foster a positive relationship. It would be positive in the sense that respectful engagement focuses on the expectation goals and needs of all stakeholders involved, rather than focusing on the shortcomings of each party (ibid.). Although not explicitly addressed in Carmeli et al.´s paper, this mechanism would, in a sense, require a non-normative approach, i.e., an approach that avoids both evaluating others´ diversity and considering one's own assumption as the absolute truth. The second mechanism proposed by the researchers, communication, would rather require what the transcultural learning model defines as pro-sociality. The third mechanism, advice seeking and giving, could lay the foundations for better cooperation. Through the process of seeking and giving advice, parties can develop cooperative patterns that can be refined over time, improving their ability to cooperate. By sharing valuable information, parties can realize the benefits of cooperative patterns and increase their willingness to cooperate (ibid.). The organizational learning process among stakeholders connected in relational-based ties is defined as a co-learning process based on productive collaborative efforts, reciprocity, commitment and collective inquiry, thus fostering learning agility and related mutual gains (Carmeli et al. 2021). According to Carmeli et al. (2021), the transition from transactional ties to relational ties would require "modes of collaboration", which may presuppose ability to cooperate.

Carmeli et al. (2021) also point out that it is difficult for organizations to decide *with whom* to cooperate and *how* to cooperate. In terms of who to cooperate with, relational economics theory emphasizes the importance of identifying and prioritizing stakeholders relevant to the transactions (Wieland

2020a). As for the former, stakeholders included in the nexus should possess and invest relevant resources (either tangile or intangible) in the transaction. The prioritization regards the specificity of the resources, the period of investment (short or long term) and the willingness and ability to cooperate. Identification and prioritizing would therefore contribute to answering the question "with whom to partner". As for *"how to cooperate*", with its focus on commonalities to foster cooperation, the conceptualization of transcultural learning in terms of organizational learning may offer insights into the open questions "how to cooperate".

Carmeli et al. (2021) explain relational-based ties as buyer and supplier relationships. The organization as a nexus of stakeholders is not limited to buyers and suppliers in the context of supply chains, but to all stakeholders who invest their resources and use the organization to carry out transactions. Limiting the concept of relational-based ties to suppliers and buyers would exclude a variety of other stakeholders involved in the nexus, such as employees, shareholders, civil society organizations, to name but a few.

3. Further Conceptualizations: Non-Normativity and Pro-Sociality in the Organizational Transcultural Learning Model

The previous section was dedicated to elaborating on the conceptualization of transcultural learning in organizational contexts on the basis of existing relational economics and organizational learning literature. Nevertheless, the initial elaborations on transcultural learning bring additional concepts that have only been implicitly and marginally discussed in the organizational learning literature, and hence need further elaboration. These additional concepts include pro-sociality and non-normativity. The model of transcultural learning as elaborated by Josef Wieland (2019) and Julika Baumann Montecinos (2022) is divided into three steps, namely:

1. Encounter of actors from different cultural backgrounds: Non-normativity is required
2. Identification of existing commonalities: Pro-social capabilities are required
3. Creation of new commonalities: Common perspectives

In the following, pro-sociality and non-normativity are analyzed at the micro level. This is because the theories used to elaborate on the concepts focus on individuals. After clarifying these concepts, the implications for the organization and for learning as a relationalization of rationalties are derived.

In terms of non-normativity, some studies in the organizational learning literature have considered the role of biases. In this context, Nyman (2019) highlighted that new information can be filtered through biases, norms and beliefs (Nyman 2019), which can hinder learning. On the other hand, tolerance, openness, trust, interaction and dialogue with the "other" are described as crucial for effective learning processes (Senge 2006; Heikkila & Gurlak 2013; Nyman 2019). Although these contributions implicitly address non-normativity, this concept, like the concept of pro-sociality, has not yet been explicitly considered in the organizational learning literature. However, both non-normativity and pro-sociality are concepts included in the steps of the transcultural learning model. The existing elaboration on the TLM nevertheless does not provide a definition for the meaning of the terms in the steps of the model. Based on the social categorization theory, the contact hypothesis and Tomasello's shared intentionality theory, the following elaborations attempt to clarify the meaning of both terms followed by some elaborations on the implications for the process of relationalization of rationalities.

As for pro-sociality, it is the skill that enables the development of commonalities (pro-sociality has been extensively studied by Tomasello in his books from 1999; 2009; 2016; 2019). They are intrinsic in human beings (ibid.). Homo sapiens has developed as a species and has developed culture and societies because of pro-social skills (ibid.). Also stakeholders (human beings and collective actors) who invest resources to pursue joint goals in transactions have "shared intentionality" (term coined by Tomasello) and are therefore driven by pro-social skills. On the other hand, according to the social categorization theory, contrary to pro-sociality, non-normativity is not considered to be an intrinsic skill (Allport 1954; Dovidio et al. 2000; Hewstone et al. 2002; Hewstone & Swart 2011; Paluck et al. 2019). According to this theory, individuals categorize themselves and others into groups: "We" (members of the group) and "them" (outsiders). Biases involving normative attitudes and judgements (Hewstone et al. 2002), the opposite of non-normativity, characterize the relationship between "us" and "them". The literature on in-group psychology has shown that groups tend to evaluate their cultural and social frameworks more positively than the frameworks of the other group (Allport 1954; Dovidio et al. 2000) and consequently to regard the assumptions of their own group as the correct ones. Each group has its own truth and its own ways of doing things or, to paraphrase Senge, "each feels that his understanding is correct" (2006: 250). This leads to a sense of superiority of the belonging group (Christens 2020; Hewstone et al. 2002)[31].

Non-normative observation and analysis within the framework of the transcultural learning model does not mean changing or adapting value systems, but rather requires the ability to recognize their relativity (and not their absolute dimension). It would thus be a matter of recognizing the relative and not absolute dimension of one's own framework. Non-normativity would thus require some kind of ability to recognize that there are different cultural frames (or rationalities) and an awareness that such frames are shaped by experiences, social and cultural contexts and backgrounds. In this context, Allport emphasizes the importance of a "sense of reciprocity", defined as "a willingness to admit that all people have equal value and merit, although each prefers its own mode of life" (1954: 46).

The tendency to define one's own group's framework as absolute arises at first from the belief that it is the only one or the only *acceptable* one. It results from unconscious in-group positivity biases (Dovidio et al. 2000; Hewstone et al. 2002). The example of a child relating to others in the first years of life can help to illustrate this point. The first years of a child's life are characterized by interaction within his or her group, which in the first years of life corresponds to the family and later to peers (Allport 1954; Seidman 2015; Tomasello 2016). If, on the one hand, pro-social skills in these first years within the group are crucial for the child's development (Tomasello 2016), on the other hand, socialization confined to the family and peers shapes its reality, beliefs, attitudes and thinking (Allport 1954; Christens 2020). This process leads to an assimilation of the self to the group (Hewstone et al. 2002). Being part of the group is taken for granted by the child, and the values, assumptions, rules, culture, etc. of such a group are seen as good (Allport 1954). Since the member of the group, in this example the child, has no possibility of confrontation, the mindset of the group becomes its mindset and takes on an absolute dimension. Consequently, when actors who are integrated into certain "groups" encounter and come into contact with other groups - realities, societies, cultures, worldviews - the first reaction is not to question their own group's perspective, but rather they tend to consider their own group's frame of reference as the only one, or at least the more acceptable one. Such a judgement of the other group's perspective as being less acceptable is

[31] George Orwell (1945) on his "notes on nationalism" splendidly elaborated on the tendency of classifying people into groups and labeling them as "good" or "bad" according to one's own belonging.

based on the assumption that the group's worldview is threatened by other groups (Hewstone et al. 2002). However, such a tendency does not per se mean hostility between groups (Allport 1954).

On the other hand, some studies show that children who are confronted with diversity, e.g., children in a multi-ethnic school class, tend to be less biased (Hewstone et al. 2002). This underlines that contact between actors from different groups makes diversity seem normal, which can reinforce non-normative attitudes (contact hypothesis). When contact occurs, it can lead to recategorization (Dovidio et al. 2000; Hewstone et al. 2002) by identifying and developing existing and new commonalities. In this way, a new group emerges or, perhaps more importantly, a “sense of belonging to a group” emerges (Dovidio et al. 2000: 10). Such a process is referred to in the literature as “cooperative learning” (Dovidio et al. 2000). In this learning process, members contribute useful resources to the group, which increases interdependence. Interdependence in combination with superordinate goals are described as “the most powerful and robust aspects (…) for reducing bias” (Dovidio et al. 2000: 9ff) and for fostering cooperation (Dovidio et al. 2000; Tomasello 2016). On the other hand, cooperative patterns reduce biases (Dovidio et al. 2000), thus fostering non-normativity. In this way, non-normativity is not only a pre-requisite that should be present at the first step, but it evolves during the process.

From an organizational perspective, the stakeholders invest useful resources in the organization to pursue transactions. Although the organization itself represents a “we”, this “we” is an expression of the stakeholders´ resources. These stakeholders come from different “we-s” (or “they-s”, depending on the perspective of observation) and therefore bring different rationalities. According to the contact hypothesis, non-normativity is promoted through contact. In organizations, this contact can take place in the context of the organizational transactions. It is therefore the (physical or virtual) place where contact between stakeholders who invest resources takes place and where rationalities are to be relationalized. The relationalization of stakeholders´ rationalities is not for the sake of putting stakeholders in relation, but to relationalize their rationalities for conducting transactions. The primacy in this process is not with the single stakeholders, but the transaction[32]. This leads to a first change in the TLM: A

[32] There is a broader consensus that collective representations, like culture, are shared by group of individuals and in this sense are not individual phenomena. Individuals belong to groups and share meanings. What is not clear in the literature yet and would hence require further analysis is the form and extension of what is shared (Ho & Chiu 1998).

locus of contact should be the basis of the model (Figure 13). This locus of contact would be a form of relational spaces.

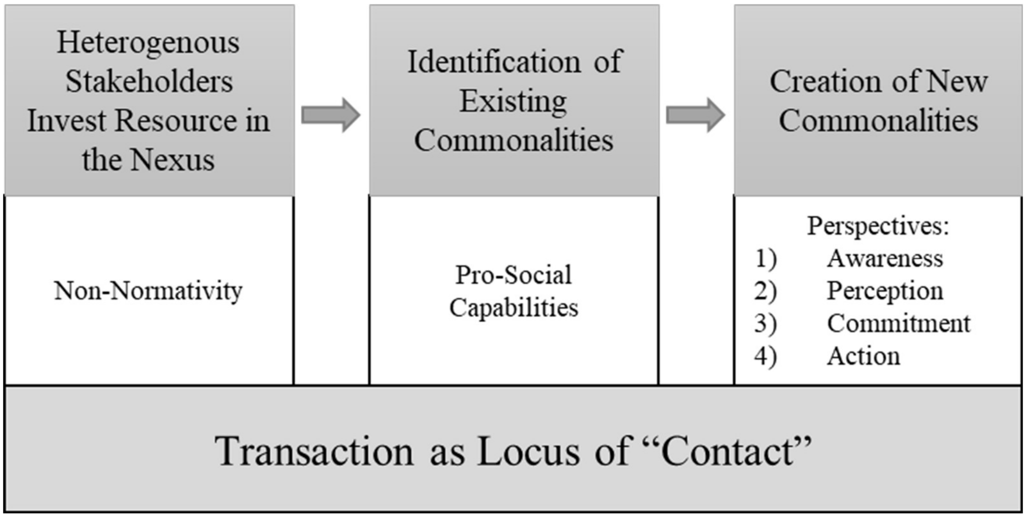

Figure 13: Transaction as Locus of Contact. Source: Own diagram.

4. *Operationalization*

The process of operationalization would make it possible to transform abstract concepts into observable procedures (Babbie 2021). In the case of the present study, operationalization would mean working out how the relationalization of multiple rationalities actually takes place in the organization.

At this point, the discussion returns to the sub-research question b, namely: How does the transcultural learning model contribute to the operationalization of the relationalization of rationalities in the organizational context?

The answer would be that it contributes to the relationalization of multiple rationalities to the extent that it provides theoretical insights into how to develop common ground and thereby a sense of "we-ness". This is not about single stakeholders included in the nexus of resources, namely "I" and "you", but a new mini-society "we". The steps of the transcultural learning model and its outcomes in the form of commonalities would therefore contribute to understanding how this common ground emerges, thereby contributing to understanding the emergence of the organzsation as a distinct joint agent "we". This is an expression of the organization as an entity in its own right.

The transcultural learning model regards cultural commonalties and refers to different expectations with reference to transactions. In this research, cultural differences refer to different rationalities. Culture in organization considers both stakeholders´ and organizational culture. The steps of the TLM regard the micro level (rationalities of the stakeholders who invest resources in the transaction). The resulted relationalization refers to the meso level (organization). Pro-sociality and non-normativity at the organizational level may refer to the organizational culture. The transcultural learning model and the resulting relationalization of multiple rationalities would then be like a relational intervention as proposed by Thygeson et al. (2021), i.e., an intervention aimed at fostering cooperation and thus organizational learning and transformation. In particular, the model can foster the "weaknessing" of the organizational culture and thereby the learning process. Through the development of common ground, transcultural learning in an organization would foster relational-based ties and an atmosphere of cooperation.

Chapter Six

The Role of Communities of Practice in the Operationalization of Relational Learning in Organizations

1. Locus of Contact

The previous chapter elaborated on transcultural learning as a model for the operationalization of learning as the relationalization of rationalities for conducting transactions in the organization as a nexus of stakeholders´ resources. The relationalization of rationalities is a process of pattern and structure formation (Wieland 2022). In pattern formation, interaction and the associated relationalization of rationalities change the nature of the transaction and form temporalized patterns (ibid.). The temporal stabilization of relationalized rationalities in governance structures leads to structure formation (ibid.). Governance structures enable the continuity of relationalization of rationalites (ibid.). This chapter will further elaborate how this relationalization actually takes place in organizations and thus contribute to further understanding of pattern and structure formation.

This chapter aims to contribute to further theoretical debate by including the concept of transaction as locus (physical or virtual) of contact and learning. The concept of communities of practice (CoPs) is adopted in this chapter to define the locus of organizational learning. The focus on CoPs as loci of learning draws on some recent elaborations on the transcultural learning model (Schwengber & Kindlein 2021; Baumann Montecinos et al. 2021; Baumann Montecinos 2022). These contributions highlight the role of CoPs in transcultural learning processes. In an elaboration on transcultural management, Wieland argues that transcultural management has to do with defining "new similarities and new cooperative CoPs" (2020a: 112). Baumann Montecinos (2022) included CoPs in the third step of an updated version of the transcultural learning model, arguing that these communities can provide patterns and structures for the learning process. Schwengber & Beretta (2021) argued for CoPs as a suitable mechanism for transcultural learning in organizations and empirically found in a case study that CoPs were among the mechanisms used to promote the development of commonalities and thus collaboration.

Nevertheless, the concept of CoPs as a locus for relationalizing multiple rationalities has not yet been conceptually explored. With this in mind, this chapter aims to answer sub-research question c, namely:

> How do CoPs provide the locus for operationalization of organizational learning intended as the relationalization of multiple rationalities in organizations?

2. CoPs as Loci of Learning

In addition to the transcultural learning literature, the concept of CoPs has been mentioned in the literature on organizational learning. CoPs were conceptually developed to create places for (social) learning. Therefore, the application of this concept to define the locus of organizational learning is not new.

CoPs are not the only concept that has been developed in the literature to define the context in which learning takes place. Since the social perspective on organizational learning has gained prominence (see discussion in chapter two), the place where this social organizational learning occurs has also gained importance. Shrivastava (1983), for example, described "participative learning systems" (1983: 22f.), i.e., committees, working groups, teams. Participative learning systems are based on frequent interactions between members and on a participative decision-making process around specific organizational issues where an organization´s members pool their knowledge and expertise (ibid). Another concept that has gained prominence in the literature is the concept of "ba" developed in Japanese literature (Nonaka 1998) but which has gained relevance worldwide. Nonaka (1998) and Nonaka et al. (2008) define "ba" as the physical or virtual interaction space where knowledge is created. Scholars of "ba" explicitly reject the overlap between "ba" and CoPs, as they argue that CoPs are places of learning and "ba" is a place of knowledge creation and that:

> "The boundaries of community of practice are firmly set by the task, culture and history of the community, the boundaries of ba are fluid and can change quickly. While membership in a community of practice is fairly stable, and it

> takes time for a new member to learn about the community and become a full member in practice, membership in ba is not fixed, participants come and go." (Nonaka et al. 2008: 36)

As for the claim that membership in a community of practice is stable, it does not seem to find support in the literature on CoPs, as scholars on this topic emphasize the permeability of CoPs' boundaries and their dynamism. As for the claim that "ba" is a locus of knowledge creation and CoPs loci of learning, there is also evidence in the literature of learning as a knowledge creation process (see Paavola & Hakkaarainen 2005; Hong & Sullivan 2009 and Chapter 2 in this text). However, the overlap between the two concepts depends on the definition of learning (as a knowledge-creating process).

In this research the locus of learning should provide the context for relationalization of rationalities and may be connected to the concept of transaction. Although on the one hand the literature on CoPs focuses on the social aspect of learning, emphasizing learning as a situated process and highlighting the role of a common domain (that connects the parts involved in the learning process), on the other hand the learning outcomes of learning in CoPs are not defined a priori by the literature (different outcomes are possible). Furthermore, scholars from the CoP literature do not see learning as limited to boundaries within an organization, but as a process in which different stakeholders may be involved. This view would be consistent with the definition of the organization as a nexus of stakeholders. Against this backdrop, the following elaborations aim to contribute to the conceptual development of CoPs as loci of organizational learning. To achieve this aim, this chapter is divided into three parts:

1. Literature review on CoPs (3.): The literature review is divided as following:
    a. Concept of CoPs (3.1)
    b. CoPs in organizations (both conceptual and empirical studies on organizational CoPs and their impact on organizations (3.2)
2. Exploring conceptual connections between CoPs and transcultural learning (4.): Aim is to lay the theoretical foundations for integrating the concept of CoPs in the transcultural learning model.
3. Studying conceptual changes (5.): What conceptual changes with respect to the literature on CoPs would be necessary for using the concept of CoPs for the operationalization of organizational relational learning.
4. Integration of CoPs in the transcultural learning model (6.).

5. Assessing relational learning (7.): After integrating CoPs into the model of transcultural learning and thus providing a theoretical model for operationalizing relational learning, point seven elaborates on the proxies for assessing relational learning.

3. Literature Review on CoPs

3.1 The Concept of CoPs

CoPs are defined as:

> "Groups of people[33] who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis." (Wenger et al. 2002:4)

The concept of CoPs is conceptually rooted in social learning theory. CoPs have been conceptualized as the locus where "learning in practice" takes place. The first conceptualization of CoPs was elaborated by Lave & Wenger (1991) and further elaborated by Wenger and his colleagues (Wenger 1998; Wenger et al. 2002; Wenger et al. 2015). The conceptual development of CoPs includes elaboration on the dimensions, the fundamental elements and the peculiarities of CoPs.

As for the dimensions, these are (Wenger 1998):

- Mutual engagement
- Negotiated enterprise
- Repertoire of negotiated resources accumulated over time

Mutual engagement is described as the process that leads to the formation of CoPs over time (Wenger 1998). It is triggered by a joint negotiated enterprise, which is understood as the willingness to do something together. This willingness to cooperate in a joint enterprise triggers the development of shared practices and meanings (second dimension) and a repertoire of negotiated resources (third dimension) (ibid.).

Wenger et al. (2002), with specific reference to CoPs in organizational contexts, have outlined the main characteristics of CoPs. These aim to

[33] Although the definition refers to people, in this research this refers to stakeholders, which can be both people and collective actors.

distinguish CoPs from other organizational groups such as teams and projects (ibid.) and are:

- Voluntary engagement
- Informality
- Autonomy

Informality is not to be understood as a synonym for disorganization. Rather, it means that CoPs “evolve in organic ways that tend to escape formal descriptions and control” (Wenger 1998: 119).

Furthermore, some fundamental elements have to be present to define a group as a CoP (Wenger et al. 2002):

- Domain: Members must share common ground
- Community: Members must develop relationships based on their common ground
- Practice: Through mutual engagement, members develop shared knowledge/approaches, namely practices, to deal with their common domain

To summarize, a shared domain connects actors in a community aimed at developing shared practices to pursue such a shared domain. In this definition, practices represent intermediary outcomes of situated learning in CoPs. Practices are a medium to pursue a shared domain.

3.2 CoPs in Organizations

The initial elaboration of the concept of CoPs by Wenger and colleagues was followed by numerous contributions on the subject. These contributions aimed both to further elaborate the concept and to analyze its empirical applications. Literature contributions appeared in many fields such as medicine (e.g., Cruess et al. 2018), foreign policy (e.g., Bicchi 2011), education (e.g., Maynard 2001; Hodkinson & Hodkinson 2004; Montgomery & McDowell 2009), higher education (e.g., Thiry & Laursen 2001; Tight 2004; Baumann Montecinos et al. 2021), to name but a few. Another area of research in which the concept of CoPs has been analyzed and developed is the literature on organization and organizational learning.

In the following, conceptual and empirical studies on CoPs in organizations are presented and discussed. The aim of reviewing conceptual and empirical studies is to provide an overview of the concept of CoPs in organizations, and how the concept of CoPs has influenced the literature on organization and organizational learning.

The literature review on CoPs presented here follows a semi-systematic approach (Snyder 2019) in the sense that it focuses mainly on papers dealing with CoPs in organizations and does not aim to systematically cover the entire literature on CoPs. Keywords such as "organizational CoPs", "CoPs in organizations", "inter-organizational CoPs" were used to select the papers. Initially, no time span was set in order to identify the papers regardless of the date of publication. To get an overview of the most recent literature, a date range (from 2017) was adopted in a second step. Both intra- and inter-organizational CoPs in the literature were analyzed. Only English-language papers were considered.

3.2.1 Review of Conceptual Studies

Conceptual studies have examined CoPs as a concept to define the nature of the organization itself. In this context, Wenger argues that "organizations are social designs directed at practices" (Wenger 1998: 241) and Tsoukas underlines the character of firms – although it may apply to all kinds of organization - "as a discursive practice: a form of life, a community in which individuals come to share an unarticulated background of common understanding" (Tsoukas 1996:23). A complementary view describes organizations not as a single community of practice, but rather as "a texture of inter-related practices" (Gherardi 2009: 352), a "constellation of practices" (Kislov 2014; Wenger 1998), terms that denote the interconnection between multiple intra-organizational CoPs rather than their simple aggregation. Indeed, the development of practices related to specific joint enterprise (communities) does not preclude the unfolding of new practices with reference to other enterprises, as different CoPs may co-exist.

The aforementioned peculiarities of CoPs - voluntary engagement, informality and autonomy (Wenger et al. 2002 – see point 3.1 in this chapter) - may lead to a trade-off between organization as an institutionalized and formal entity and organization as a constellation of practices. The point is that firms – and organizations in general – are formally constituted, or to paraphrase Williamson, they are "governance structures" (Williamson 2005) that contractually link most of their stakeholders to the organization. Organizations as governance structures does not preclude that organizations can also be viewed as CoPs and that CoPs may be defined as governance structures. CoPs as governance structures can be divided into what Wenger (1998) defined as designed and emergent structures (Wenger 1998). The former takes the form of an institution, which connects practices and holds the organization together. The latter corresponds to practices which “give life to the organization and is often a response to the designed organization” (Wenger 1998: 241). Furthermore, the practices that form the emergent structure can be both “exposed” and “actual” practices (Brown & Duguid 1991). Although the latter are not captured by institutionalized processes, formalized in the organizational “manual”, they do not lose their relevance in the organizational learning routine. Indeed, informal non-canonical practices have always existed and will always exist, since organizations cannot map all tasks onto which Brown & Duguid define as “a set of simple, Tayloristic, canonical steps” (Brown & Duguid 1991:42). Designed and emergence structure somehow overlaps with formal and informal governance mechanisms (for an overview, see Wieland 2020a).

The boundaries of an organization as constellations of practices can overlap the institutional boundaries. In a knowledge economy, CoPs can potentially involve stakeholders who are not formally linked to the organization, so that the boundaries of CoPs can extend beyond institutional boundaries. A constellation of practices is not confined to organizational institutional boundaries but expands in its environment. In a knowledge-based economy, practices created in relationship with stakeholders transcend the organizational boundaries into what Wenger et al. (2002) defined the “extended knowledge system”. In this extended knowledge system, knowledge is dispersed, namely knowledge is not self-contained, in the sense of not being owned by a single organization or individual. Organizations cannot exist and operate in isolation but, to paraphrase Brown & Duguid, in such a system “different organizations mutually reconstitute each other dialectically and reciprocally” (Brown & Duguid 1991: 52).

These debates about knowledge are also related to the discussion about the nature of organizational knowledge in CoPs. Traditionally, learning outcomes, both in individual and organizational learning theory, are associated with knowledge. In organizational literature, a distinction is made between organizational knowledge and practices. They represent two facets of the phenomenon of learning. In particular, practices are understood as the pragmatic applications of organizational knowledge. In this context, some scholars propose the distinction between knowledge and knowing, a distinction that can be conceptual as well as lexical (Cook & Brown 1999; Orlikowiski 2002). Knowing requires doing, acting, and knowledge is situated in the intellect (Cook & Brown 1999; Orlikowiski 2002). Intellect is a human quality. If knowledge is located in the intellect, it would not be organizational, but purely individual. Clemens (2021) describes knowledge as relational. The scholar argues that, traditionally, individuals are represented as knowledge holders, i.e., knowledge is something located in individuals and in the human brain (intellectual). Clemens (2021) argues for a relational view of knowledge. In her view, knowledge is located neither in the individual nor in the network, but inbetween. It is not something that someone possesses, but is in constant flux and change. The emergent zone of knowledge is the relation between the object (or situation) and all the entities involved. In this sense, knowledge is always situated and temporary. It is in a constant state of reconstitution (ibid.). In organizational relational learning, knowledge would be the result of a micro-meso relation. Organizational knowledge would be the result of a transcendental relationship. At the level of the organizational dimension of knowledge, Cook & Brown (1999) propose a distinction between organizational knowledge based on an epistemology of possession and organizational knowing based on an epistemology of practice. The researchers also propose bridging the two epistemologies, between what the organization knows and what it does (Cook & Brown 1999).

In the literature on CoPs, knowledge and practices are not separate concepts, making the dichotomy between the two meaningless. This rejection of such a dichotomy is also present in the pragmatic approach towards organization, since it forces "hard epistemological distinctions" (Simpson & den Hang 2022: 131)[34]. Knowledge and practices have a dialectical relation (see Wenger et al. 2002; Weick & Roberts 1993; Cook & Brown 1999). According to the literature on CoPs, the distinction between knowledge and practices is a conceptual one. Such a distinction cannot be captured in empirical observations of daily organizational activities. Organizational practices are not explicitly distinguished from organizational knowledge, but are interrelated and complementary (see Brown & Duguid 1991 for a review). Against this background, Brown & Duguid propose the concept of "learning-in-working", which assumes a unified and synergistic understanding of knowledge and practices (Brown & Duguid

[34] The rejection of the dichotomy between knowledge and practices is also present in further streams in the literature, like the philosophical stream of social constructionism. For example, Burr rejects the epistemology of knowledge as possession and asserts that knowledge "(…) is not something that a person has or doesn´t have but is something that people do together" (Burr 2003: 9).

1991:41). “Learning-in-working” is conceptually connected to Wenger's “learning in practice” (Wenger 1998).

Such a view of the organization and organizational learning in the literature of CoPs also has implications for management. Indeed, conventional management approaches risk nullifying the benefits of CoPs (Wenger et al. 2002). Conventional management approaches focus on active management, but according to the literature on CoPs, rather than actively managing the development of CoPs, organizations and their managers ought to focus on detecting and supporting existing communities (Brown & Duguid 1991). Alternative management approaches in global value networks should aim to foster the self-development of the constellation of practices and the extended knowledge system. “To cultivate” is the verb used by Wenger and his associates (Wenger et al. 2002). Cultivate means “to create an environment in which they (CoPs) can prosper” (Wenger et al. 2002:13). Against this backdrop the scholars identified seven principles for cultivating CoPs (Wenger et al. 2002) that are aimed at avoiding CoPs “for their own sake, but at building the organization´s overall capacity to learn and innovate” (Wenger et al. 2002:190 f.). These seven principles are (Wenger et al. 2002: 62 ff.):

1. Design for evolution
2. Openness to dialogue between inside and outside perspectives
3. Invitation of different levels of participation
4. Development of both public and private community space
5. Focus on value
6. Combination of familiarity with excitement
7. Creation of a rhythm of the community

To summarize, organizational learning in the literature of CoPs is neither seen as a complementary function in the diverse range of organizational functions, nor reduced to a human resource task, but as the main principle of organization:

> “It (the concept of learning in practice) elevates learning from relegation as a secondary function to being the central organizational principle. The purpose, then, is not primarily to design and deliver courses but rather to develop the learning potential of an organization.” (Wenger 1998: 250)

In reviewing the literature on conceptual studies of CoPs in organizations, it became clear that many of these studies were chronologically concentrated around the turn of the last century (late 1990s and early 2000s). During this time, the concept of CoPs was still a new concept that needed further elaboration. More recently, studies on CoPs have also focused on their applications and impact on organizations (which nevertheless began to emerge in the same period of the conceptual studies).

3.2.2 Review of Empirical Studies

The first studies on the applications and impacts of CoPs in organizations include Wenger & Snyder (2000). The researchers identified some of the potential impacts of CoPs for organizations. They argue that CoPs help to drive organizational strategy, develop new business, solve problems quickly, transfer best practices, develop professional skills, and recruit and retain talent (Wenger & Snyder 2000). Apart from the elaborations of Wenger and his associates, the topic has been studied by numerous scholars. Thematically, CoPs have been studied mainly (1) as a tool to foster the development of social capital in organizations, (2) as a knowledge management mechanism, (3) as a link between CoPs and organizational innovation, and (4) as CoPs in global organizations.

Regarding the first of these themes, many papers have linked CoPs to the development of social capital in organizations. For example, Lesser & Prusak (1999) describe CoPs as a tool for building social capital that affects behaviour and thus influences performance. The theoretical argumentation of the scholars starts by linking two main backgrounds: Wenpin and Ghoshal's (1998) dimension of social capital, namely structural, relational and cognitive, on the one hand, and Wenger's CoPs on the other. In their conclusion, they argue that the ability of CoPs to provide opportunities to develop networks, foster interpersonal interactions and maintain a common vernacular would enable the development of the structural, relational and cognitive dimensions of social capital. However, the study also highlights that to achieve these outcomes, organizations should identify and cultivate CoPs, which may require investment and thus expect returns (ibid.).

Lesser & Strock (2001) also linked CoPs to the development of social capital in an empirical case study involving seven companies. In this case, the researchers investigated how the development of social capital through CoPs leads to behavioural change (1) and thus influences organizational performance (2), contributing to the value creation process (3) (ibid.). The results underline that business performance is positively influenced by CoPs in four different ways (ibid.):

- Decreasing the gradient of the learning curve
- Increasing customers' responsiveness
- Reduction of duplication and prevention of reinvention
- Increasing innovation

Another case study on Spanish companies in China finds that CoPs enable the development of social capital also in inter-organizational CoPs (Urzelai & Puig 2019). The study investigated whether interaction within CoPs between managers of Spanish companies relocated to China and sharing a common domain, namely operating in a new and challenging environment, enables the development of common practices needed to deal with the local context, and thus the development of international social capital. The findings show that the social learning process within CoPs, based on cooperation in addressing common challenges, leads to the development of international social capital in its three dimensions: structural, cognitive and relational (ibid.).

The role of CoPs in fostering innovation is another topic that is widely analyzed in the literature. For example, in a systematic literature review on this topic, Pattinson et al. (2016) reviewed whether CoPs really enable innovation and identified four main pathways of CoPs that are commonly used to foster innovation capabilities. The results show that two of these pathways of CoPs promote innovation and two constrain it. The former pathway includes (1) intra-organizational CoPs conceived as non-canonical mechanisms and (2) "CoPs as dispersed collaborative configurations", intended as inter-organizational CoPs focused on "open innovation approaches". As for the pathways that constrain innovation capabilities these include (1) "CoPs as situated platforms for professional occupations", e.g., medics, professors, inter alia and (2) "CoPs as governance structures designed for a purpose".

Empirical evidence of the positive relationship between CoPs and innovation can also be found in a study conducted in 325 creative and technology companies based in China (Hao et al. 2017). This study found that participation in professional CoPs promotes the following:

- Innovation performance
- Intellectual capital
- Psychology safety

The study also analyzed CoPs from a knowledge management perspective. Indeed, in the study CoPs are described as "effective and low-cost platforms of knowledge" (Ibid.: 205) and referred to as "soft knowledge structures" (Ibid.:

210). The study nevertheless underlines the necessity to integrate these soft knowledge structures with formal and traditional structures and to encourage and support employees´ participation in CoPs (ibid.). The importance of institutionalized practices for organizational performance is also highlighted by Gherardi (2009), who defines institutionalized practices as “recognized ways to perform an activity” (Gherardi 2009: 356). The combination of formal and informal learning mechanisms would enable the foundations to be laid for a more flexible knowledge organization that can meet the changing demands of a turbulent environment and thus promptly fill knowledge gaps that may emerge (ibid.). Venkatraman & Venkatraman (2018) also examined CoPs from the perspective of knowledge management systems and provided a series of steps as a practical guide for implementing the knowledge developed in organizational CoPs, namely building knowledge, holding knowledge, pooling knowledge and leveraging knowledge (ibid.).

Although the concept of CoPs can be applied in all types of organizations, many studies have as their unit of analysis global organizations. In these organizations, CoPs are described as a mechanism that enables geographically dispersed knowledge to be pooled. Early work on CoPs already addressed the issue of global CoPs and their connection to other topics (such as innovation). Indeed, Wenger and his collaborators pointed out that CoPs can bring together “the world´s leading expertise, no matter where it was located, to bear on problems and issues, no matter how they occur” and may facilitate the creation of a “worldwide talent pool” (Wenger et al. 2002:136). Understanding how global CoPs function would shed light on how innovation, social capital and knowledge management (the other main themes in the literature on CoPs in organizations) also function in such global CoPs. In this sense, the analysis of global CoPs encompasses the other main themes in the literature on CoPs in organizations.

As far as the empirical application of global CoPs in heterogeneous and geographically dispersed organizations is concerned, perhaps the best-known example of an intra-organizational CoP is the World Bank, which defines CoPs as follows:

> “A gathering of individuals motivated by the desire to cross organizational boundaries, to relate to one another, and to build a body of actionable knowledge through coordination and collaboration.” (World Bank Group 2018: 7)

With regard to the empirical impact of global CoPs, Retna & Tee Ng (2011) conducted a study in a global company that focused on identifying the success factors of CoPs. The researchers identified the factors that strengthen the contribution of global CoPs to organizational performance. Three main factors were identified:

- Distributive leadership (based on leaders´ personal commitment, conjoined activities and bottom-up practices)
- Appropriated organizational culture
- Individual motivation to learn

The findings of the study suggest that the contribution of global CoPs to organizational performance may depend on multiple and inter-related aspects: Organization, leadership style and individuals belonging to the organization. Nevertheless, these elements do not work alone, but rather should be relationalized (ibid.). There should be a link between the organizational structure and its processes and practices in the organizational system. Drawing on Luhmann:

> “There are no structures and separate processes (…) One may say, then, that structures are the representation of the recursive interconnectedness of operations that is used in the system.” (Luhmann 2013: 244)

This would be in line with the relational leadership theory[35], i.e., a theory of leadership that defines leadership as a social process and focuses on relationships and social exchange (Wieland 2020a). Indeed, relational leadership seeks to influence motivation and structures to pursue common goals, which is in line with the global success factors of CoPs. Retna & Tee NG's (2011) findings on motivation and structures as success factors of CoPs can provide some empirical evidence for relational leadership as an efficient leadership approach in CoPs, which can be further empirically investigated.

The focus on global CoPs has come to the fore with the increasing importance of globalization and global networks. In such a context, the opportunities to cross cultural boundaries and to have transcultural encounters have increased, and CoP scholars argue that CoPs can be the locus for such encounters:

[35] While distributive leadership refers to the leadership style, relational leadership refers to leadership as a theoretical concept.

> "It is communities of practice that create the relationships required for global integration. Strong human relationships are key to integration across geographically distributed business units as well as to effective partnerships. By uniting people from different regions, countries or divisions around topics they feel passionate about, communities increase the density of relationships between distributed business units." (Wenger et al 2002: 135-136)

Global interaction within CoPs would therefore ideally lead to the development of those practices required to operate successfully in globalized networks characterized by interconnected and culturally heterogeneous actors, where problems often require innovative solutions that may not originate from a single mind or department or organization. Orlikowski pointed out that practices should enable organizations to operate "effectively across temporal, geographic, political and cultural boundaries" (Orlikowski 2002: 249).

Practices that cross borders and result from interaction between heterogeneous stakeholders do not preclude or diminish the importance of localism. Even practices that emerge and are developed in global and transcultural CoPs can be applied at the local level. The dichotomy of "thin" and "thick", "global" and "local" (Walzer 1994) also applies to practices developed in global communities of practice, since practices that emerge as a result of transcultural encounters can be applied in very specific local contexts. This means that a potential global body of knowledge can enable the development of practices that are applied in specific situations at the local level. In this context, Wenger (1998) points out that practices developed in global CoPs primarily have an impact at the local level, as they are applied in everyday organizational life despite the international dimension. A multinational company or a global network of organizations carries out its daily routine at the local level, although it is aware of being part of an international reality[36]. A similar view can be found in Weick & Roberts (1993), who emphasize the relevance of Hutchins´ local computations, intended as the local implementation of global plans and procedures.

To ensure this connection between the global and the local in the context of CoPs, the first elaborations on the topic used the concept of "cells", which envisages the division of global CoPs into interconnected parts, i.e., cells, that

[36] As an example, a case study conducted at a global firm and focused on a specific organizational value, demonstrated that, although the value under analysis applies to all subsidiaries around the world, the way it is applied may be adapted to the local reality (Schwengber & Kindlein 2021).

take local diversity into account (Wenger et al. 2002). The connection between the cells is ensured by local coordinators, also called facilitators (Retna & Tee 2011), boundary spanners (Heikkila & Gurlak 2013), experts with intermediary functions (Kislov 2014; Zaheer & Bell 2005), system conveners (Wenger et al. 2015), whose task is to broker relationships. In inter-organizational CoPs, cells can be formed by different organizations. To promote collective action in the context of inter-organizational relationships, Gibb et al. (2017) advocate the identification of a hub organization that can bridge the different interests in the nexus of organizations, bring together resources and capabilities, and coordinate the flow of knowledge. The role of facilitators or hub firms can be understood as brokerage between structural holes (Burt 2004), whose connection allows access to different sources of knowledge, information and perspectives distributed in the large network. Once structural holes are connected the density of relationships among participants increases (ibid.). Thus, by connecting diversified and dispersed nodes, coordinators facilitate the learning process in the context of CoPs. Referring to the relational learning model, such a facilitator can facilitate the encounter and contact between heterogeneous stakeholders bringing diverse rationalities and their relationalization within CoPs. The main goal of such a figure would be to facilitate and moderate transactions by enabling "contact" between stakeholders: Getting to know each other and reducing prejudices between groups, thus promoting non-normative attitudes and pro-sociality (step one in the transcultural learning model). More precisely, a coordinator's task would be to increase psychological safety, thereby fostering trust, commitment and respect. Among highly heterogeneous stakeholders, trust is fundamental for developing common ground and for the creation of a third space, mini-culture or new cultural situation. Indeed, social categorization theory emphasizes that trust is an element that distinguishes in-group (mini-culture) from inter-group (inter-culture) relations, as it characterizes in-group relations while it is excluded for out-group members (Hewstone et al. 2002).

As for the role of trust, the literature on collective learning also points to the crucial importance of trust in social dynamics to foster collective learning processes (e.g.; Heikkila & Gurlak 2013). Only if sufficient trust is developed would a collective learning process lead to what Weick and Roberts (1993) call a "collective mind" that transcends the single individual. In addition to the psychological perspective on trust, the literature also explores the role of trust in inter-organizational relationships, as trust in such relationships leads to a reduction in transaction costs, an increase in information sharing and performance (see, e.g., Binder 2019; Dyer et al. 2018).

4. Exploring Conceptual Connections Between Learning in Practice and Transcultural Learning

In point 3 (3.1 and 3.2), a literature review on CoPs was presented with the aim of providing an overview of the concept of CoPs, their empirical applications and their implications for organizations. The literature review forms the basis for a conceptual analysis that aims to explore conceptual links between learning in practice and transcultural learning. The reason for conducting such a conceptual analysis lay in the importance given to CoPs in elaborations of the transcultural learning model (Baumann Montecinos 2022) and, to a lesser extent, in relational economics theory (Wieland 2020a). The exploration of conceptual connections would allow the concept of CoPs in the framework of transcultural learning to be integrated. The integration of CoPs in the transcultural learning model would then allow one to answer the research question regarding how CoPs may contribute to operationalizing relational learning.

A first conceptual connection that has emerged is the concept of learning that is not limited to the intra-organizational context. In CoPs, learning goes beyond the institutional boundaries of the organization and extends to a broader knowledge system. Since the model of transcultural learning has not been conceptualized in terms of organizational learning before this study, the existing elaborations of the model do not touch on this specific point, which makes the conceptual link seem weak. Nevertheless, in the theoretical framework of relational economics theory, the organization is a nexus of stakeholders´ resources. The nexus includes stakeholders within the institutional boundaries of the organization (e.g., employees) as well as beyond the institutional boundaries (e.g., suppliers, customers, NGOs).

A second conceptual connection concerns the role of heterogeneity in the learning process. Both CoPs and transcultural learning emphasize the encounter of heterogeneous actors. According to Wenger, "what makes engagement in practices possible and productive is as much a matter of diversity as it is a matter of homogeneity" (Wenger 1998: 75). In the transcultural learning model, diversity is dialectically related to commonalities (Baumann Montecinos 2022). A conceptual difference between elaborations on transcultural learning and CoPs is related to the timeframe in which the commonalities are placed. In the transcultural learning model, the identification and development of commonalities is the outcome of learning. In this sense, even if heterogeneous actors have some commonalities in the initial phase of the learning process, they could not be yet aware of them, as it is the process that leads to the identification and development of commonalities. In learning in practice, there should be common ground from the beginning, as without common ground, the parties will not engage in learning in practice. Through mutual engagement, the parties that have a common domain interact with the aim of developing common practices to fulfil/achieve the domain. The initial domain that connects the parties represents initial commonalities that can enable the development of shared practices to pursue the domain. These shared practices, which are the result of mutual engagement, can represent new commonalities.

Similar to the transcultural learning model, in learning in practice, too, a focus on commonalities (shared domain/shared practices) is not a process of overcoming diversity. The identification and pursuit of a shared domain (existing commonality) does not reduce diversity, but rather requires ongoing communal negotiation among different views (Wenger 1998).

In a further elaboration, Wenger and his associates pointed out that the same actor can be active in several CoPs at the same time and coined the term "landscape of practices" (Wenger et al. 2015). Wenger et al. (2015) emphasize the role of shared meanings that connect members of particular CoPs. Scholars engaged in methodological relationism also address membership in different groups or systems. Ho & Chiu (1998), for example, in their elaboration on the development of shared meanings, emphasize the dynamics of the boundaries of groups linked by shared meanings. The same actor can belong to different groups and the group itself can be very heterogeneous (Ho & Chiu 1998). Another scholar of methodological relationism, Bunge (2000) also points out that actors today belong to different systems.

These different practices (or groups or systems) are like "mini-cultures" (Wenger et al. 2015), a term conceptually connected to Wieland's "mini-societies" and "new cultural situations" referring to very specific temporary transactions (2020a). Tomasello defines these shared new spaces resulting from joint actions as a "shared conceptual world" (Tomasello 2016). "Mini-societies", "mini-cultures", "new cultural situations", "shared conceptual worlds" are concepts that cross cultural boundaries and connect (perhaps temporarily) culturally heterogeneous actors. In an elaboration on this topic, Kislov (2014) proposed the concept of ongoing joint work at (cultural) boundaries to build bridges (2014: 310). When heterogeneous parts meet, a new cultural situation does not automatically emerge. Actors have to negotiate, discover commonalities, realign perspectives, build trust (Wenger et al. 2015: 97). In the case of communities formed by highly cultural heterogeneous actors, practices may be the result of the synthesis of different approaches, different frameworks, different ways of perceiving a domain.

Some empirical data on the impact of diversity on CoPs is provided by a study by Kirkman et al. (2013). The study had global CoPs as the unit of analysis and national diversity as the variable. The aim was to analyze how a change in this variable affects the performance of CoPs. Psychological safety and media richness were selected as moderators of the relationship between national diversity and performance. The researchers identified two competing processes that have different effects on performance, namely social categorization and the information/decision-making perspective. The former leads to the development of cultural sub-groups, while the latter ensures diverse perspectives. While, on the one hand, the development of cultural sub-groups would hinder (trans)cultural cooperation and have a negative impact on performance (Kirkman et al. 2013), on the other hand the second process - which ensures different perspectives and brings new insights - would lead to better decisions and better cooperation, and thus have a positive impact on performance (ibid.). The issue was to understand which process would prevail. The findings demonstrate a curvilinear (J-shaped) relationship between national diversity and the performance of CoPs (Figure 14).

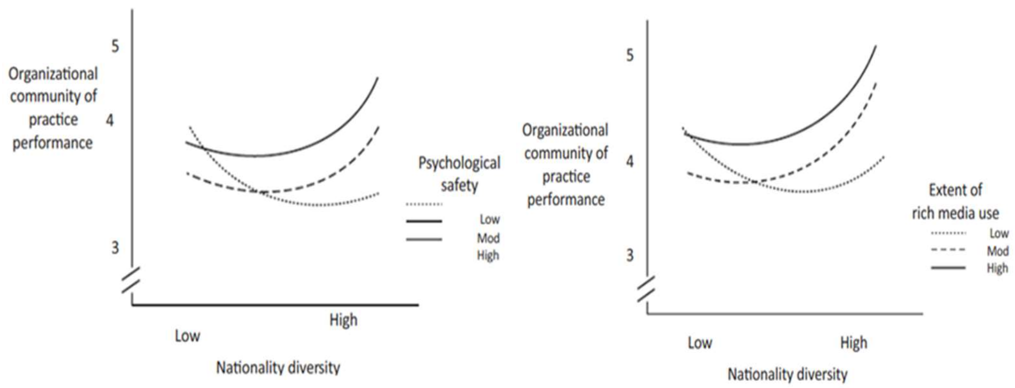

Figure 14: Relationship Between Nationality Diversity and Organizational Community of Practice Performance as Moderated by Psychological Safety and by the Extent of Rich Media Use. Source: Kirkman et al. (2013: 250 f.).

In summary, according to Kirkman et al.'s findings, starting from a homogeneous community, an increase in national diversity leads to an increase in social categorization (negative effects on performance). However, as CoPs become increasingly heterogeneous, a climate of psychological safety reduces initial discomfort. Media richness supports this process by facilitating the exchange of complex information, promoting integration and minimizing misunderstanding (Kirkman et al. 2013).

The findings of Kirkman et al. (2013) have relevant implications for the role of heterogeneity in CoPs and their management and can serve as a starting point for further elaboration of this point. Based on the results, the J-shaped curve can be divided into two different parts (Figure 15).

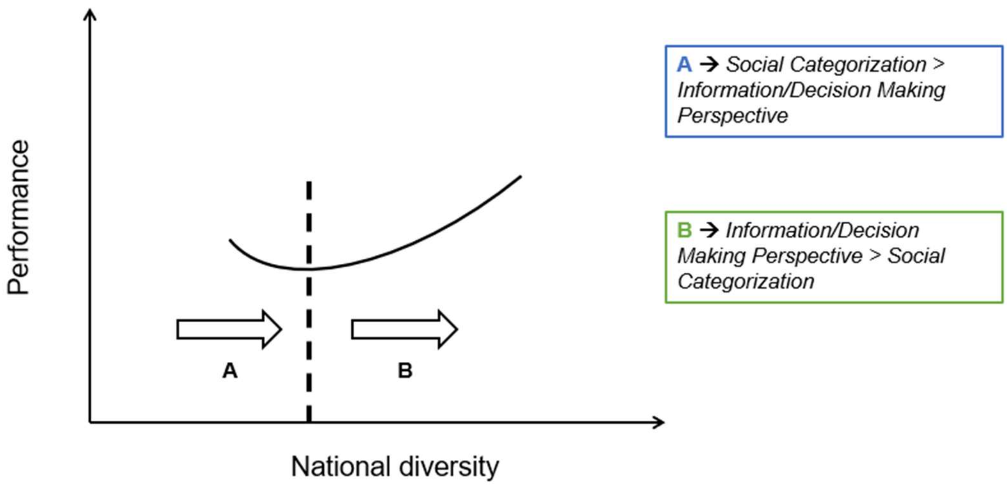

Figure 15: Relationship Between Performance and Diversity. Source: Adapted from Kirkman et al. (2013).

In part A, the relationship between the two variables is negative, i.e., when national diversity increases, performance decreases. Accordingly, social categorization prevails over the information/decision making perspective, and diversity hinders performance. In part B, a further increase in national diversity is associated with an increase in performance, illustrating a positive relationship between the variables. In this part of the diagram, the information/decision making perspective prevails over social categorization, and diversity becomes a performance-enhancing resource. Kirkman et al. (2013) used psychological safety and media use to explain the J-shaped relationship and thus the transition from Part A to Part B in the graph.

Rich media use (such as videoconferencing) allows nuances such as tone of voice, facial expression and body language to be captured. These nuances reduce misunderstandings, facilitate the exchange of complex information and promote inclusiveness. Psychological safety, meaning that members who value each other´s skills and talent, feel free to share information, to discuss, etc., would be promoted through ongoing interactions and through specific managerial interventions. The role of these moderators in understanding the prevalence of decision-making perspective over social categorization finds theoretical support in the already discussed "contact hypothesis theory" (Allport 1954; Dovidio et al. 2000; Hewstone & Swart 2011).

Discussing the findings of Kirkman et al. (2013) in their implications for the contact hypothesis theory can shed light on how heterogeneity can be managed to realize its potential in CoPs. In the view of the work at hand, for leveraging the potential of heterogeneity the different rationalities that heterogenous stakeholders may bring would require relationalization. The contact hypothesis would therefore contribute to elaborating on the role of CoPs as locus where different rationalities are relationalized. According to the contact hypothesis theory, it is realistic to assume that rich media use and the related psychological safety would reduce social categorization and increase the decision-making perspective as both foster contacts. Contact is a necessary but not sufficient condition. Scholars of social categorization theory argue that contact between members of different groups should be based on four pre-requisites to be effective:

1. "Equality" in terms of values (Dovidio et al. 2000; Hewstone & Swart 2011), a sort of "peer relation".
2. Cooperation – rather than competition – towards a common goal (Dovidio et al. 2000; Hewstone & Swart 2011).
3. Opportunities to acquaintance (Dovidio et al. 2000).
4. Institutional support (Dovidio et al. 2000; Hewstone & Swart 2011).

Equality, acquaintance, cooperation and organizational support cannot be treated as automatic processes but are part of a cooperative learning process that requires time (Dovidio et al. 2000).

In a further conceptual effort, these pre-requisites could be included in the transcultural learning model (Figure 16). The first pre-requisite of recognizing a heterogeneous alter ego as equal also includes seeing it neither as inferior nor superior, but simply as diverse (non-normativity). Equal here is not to be understood in the sense of a power relationship, but as equality in the sense of the validity of values: An alter ego's values must be neither inferior nor superior. Once this equality applies in the relationship, pro-social attitudes would provide opportunities to acquaintance (second pre-requisite), thus fostering cooperation (third pre-requisite) and the achievement of common purposes. In organization this can be fostered by institutional support (fourth pre-requisite), which would provide the frame for the whole process in the locus of CoPs.

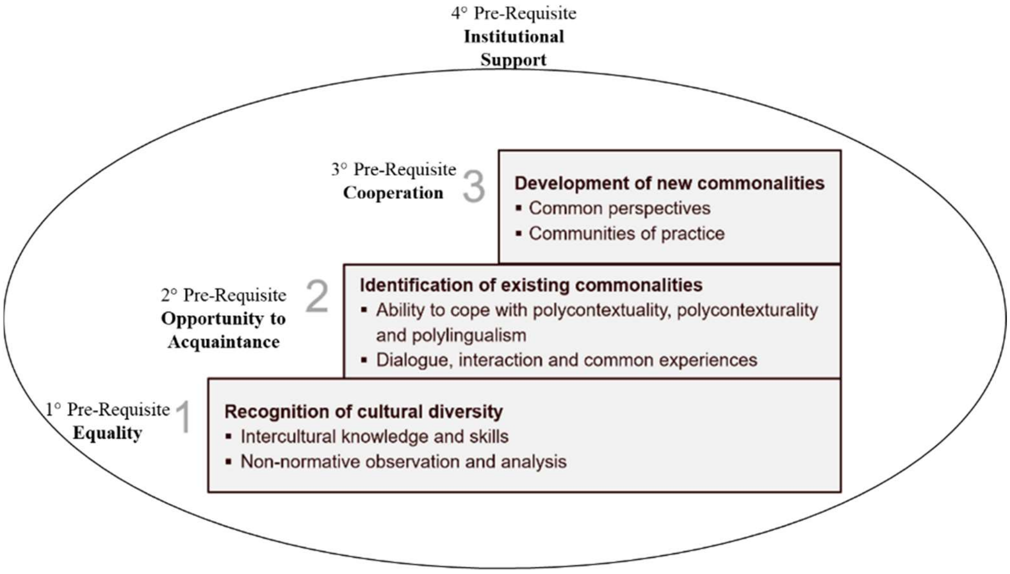

Figure 16: Pre-requisite for Successful Contact in the Transcultural Learning Locus. Source: Model adapted from Baumann Montecinos (2022)[37].

Although Kirkman et al. (2013) refers to a prevalence of information/decision-making perspective over social categorization for fostering performance, this process could rather be defined as what some scholars of social categorization theory call a "recategorization" or "cross-categorization" process as the result of successful contact. Recategorization has been described in the literature as "cooperative learning" (Dovidio et al. 2000). Cooperative learning is defined as a process in which actors bring useful resources for the group and increase interdependence. This interdependence combined with superordinate goals is described as "the most powerful and robust aspect (…) for reducing bias" (Dovidio et al. 2000: 9ff) and for fostering cooperative behaviours (Dovidio et al. 2000; Tomasello 2016). Recategorization aims to replace "we" and "they" with "us". This new "we" is the result of a redefinition of group boundaries leading to a new superordinate category, which has been defined here as a new joint agent "we".

[37] Please note that this version of the model (Baumann Montecinos 2022) puts CoPs in the third step. In the elaboration at hand, all steps occur in the locus of a community of practice.

In recategorization, organizations or networks of organizations may assume the role of what Dovidio et al. (2000) define as super-ordinate entities. Super-ordinate entities are main groups that link different sub-groups by a "common, superordinate group membership", without excluding sub-group differentiation (Dovidio et al. 2000: 22). As for the intra-organizational context, such an entity may form a group that encompasses manifold diversified sub-groups (e.g., different departments, lines of business, subsidiaries as well as employees from different cultural and social backgrounds, to mention but a few examples). These groups may form CoPs with reference to a very specific domain. These single CoPs will then be connected to the landscape of CoPs formed by the organization (super-ordinate entity that links diversified organizational CoPs). In inter-organizational contexts, the role of super-ordinate entity may be assumed by the network that encompasses manifold diversified organizations. From this perspective, the organization can be viewed both as a super-ordinate entity as well as a member of a super-ordinate entity. It depends on whether it is considered in the intra-organizational context or from the inter-organizational perspective. If the organization is nevertheless a nexus of stakeholders, the nexus itself may represent the super-ordinate entity that links together diversified stakeholders that invest resources to pursue transactions.

The literature highlights some limitations of recategorization, e.g., it threatens "to deprive individuals of valued social identities in smaller, less inclusive groups" (Hewstone et al. 2002: 590) and there is a risk of "loss of distinctiveness" (Hewstone et al. 2002: 591). These limitations can be associated with the proposition that, through recategorization, members of different groups form a new and more inclusive group (Dovidio et al. 2000). However, it could also be argued that recategorization in terms of the unfolding of a new group does not require the extinction of the original groups (Dovidio et al. 2000), thereby overcoming such limitations. The unfolding of a new group would therefore not require the neglect of diversity or the deprivation of an actor´s values. In this sense, a new "we" in the form of a smaller group can emerge without cancelling out other, already existing, groups. The sense of "we-ness" is not exclusive. "We" can be a nation, a region, a family, a group of professionals, a group of athletes, an organization. For organizations "we" can be a sector, a dimension. The sense of "we-ness" can be related to a specific nation without excluding the sense of "we-ness" with reference to a specific profession. "I" can be included in many "We-s". These multiple dimensions are defined as cross-categorizations (Hewstone et al. 2002). In the literature cross-categorization is defined as an alternative approach to recategorization. It can rather be argued that cross-categorization (multiple dimensions) can be the result of recategorization (formation of new "we-s", and therefore new smaller groups). While members of different groups interact and cooperate and form new groups, they can maintain their distinctiveness.

Another limitation highlighted of recategorization is its temporary efficiency (Dovidio et al. 2000: 19). As for the purpose of this thesis, this limitation is not relevant as the relationalization of multiple rationalities is itself based on very specific transactions (Wieland 2020a), which may not have an infinite temporal dimension. The transaction may represent a very specific and (perhaps) temporary "we". In the course of the learning process, such recategorization and the emergence of new "we-s" would lead to what Wieland (2020a) defined as temporary mini-societies based on commonalities.

Returning to the Kirkman et al. study (2013), the described cross-categorization process would facilitate the transition from point A to point B in Figure 15, i.e., diversity would move from being a barrier to being a performance-enhancing resource. Although the study conducted by Kirkman et al. (2013) looks at diversity in terms of nationality, recategorization and cross-categorization refer not only to nationality, but to sub-groups considered in general. Therefore, the elaborations presented here can be extended to all types of diversity and in this research, diversity is intended as different rationalities.

The most important contribution of the Kirkman et al. (2013) study (from the perspective of this thesis) is that it contributes to a better understanding of the role of diversity in communities of practice. The study empirically demonstrated that diversity can have either a positive or negative impact on performance in CoPs (and thus on the learning process). The positive or negative relationship between performance and diversity in CoPs may depend on (appropriate) diversity management mechanisms. Productive diversity management would transform diversity from a hurdle to a resource, which can be done through a cross-categorization process by identifying and developing commonalities. Diversity in this research is associated with different rationalities. Appropriate diversity management would be the one that enables the relationalization of multiple rationalities brought by heterogenous stakeholders in transactions. Cross-categorization (as resulting from diversity management, thus from the relationalization of rationalities) would lead to a mini-society. This mini-society transcends the relata involved in the relational process. It is not about "I" or "you", but "we". "We" transcends "I" and "you". It is both the parts that belong to the "we" and the "we" itself that learn and change. This transformation is measured by Kirkman et al. (2013) through an increase in organizational performance. The stakeholders involved in the process and that invest their resources contribute to the performance improvement, but the latter regard the organization as entity.

5. Conceptual Changes

Despite the conceptual connections between CoPs and the transcultural learning model, some conceptual changes would be necessary for the purpose of this study. These conceptual changes regard the nature of organization behind the concept of CoPs as well as its applications.

Regarding the nature of organization, the literature review on the conceptual studies of CoPs has shown that some scholars define organization as a constellation of practices. In this view, the organization itself is a constellation of CoPs. The research at hand is based on the nature of the organization as a nexus of stakeholders´ resources (Wieland 2020a). Although the nature of the organization as a nexus of stakeholders´ resources does not per se exclude a constellation of CoPs, these communities would not define the organization. The view of organization as a constellation of CoPs would be a view of an organization that operates in an extended knowledge system and would develop practices for operating in a knowledge-based economy. To define an organization as a constellation of practices would mean that the purpose of the organization would be to develop practices. In the view of the organization as a nexus of stakeholders that "use" the organization for conducting transactions, the organization is viewed as a governance structure in which workable arrangements permit transactions to be conducted. Transactions, not organizational practices, are at the centre of this definition. CoPs would be the loci of contact between heterogeneous stakeholders to promote non-normativity, pro-sociality and thereby the relationalization of multiple rationalities. From this perspective, CoPs would provide the loci for enabling transactions and, in the context of this research, they would be defined as loci of contact and organizational learning.

This specification in terms of the nature of organization may have implications for the application of CoPs in organizations defined as nexus of stakeholders´ resources. Although in the initial elaboration on the concept of CoPs, Lave and Wenger (1991) and Wenger and associates defined the dimensions (mutual engagement, negotiated enterprise and repertoire of negotiated resources), the elements (domain, community and practice) as well as the distinctive characteristics of CoPs compared to other organizational groups such as teams and projects (voluntary engagement, informality and autonomy), the concept of CoPs remains broad in terms of its application in real settings (see discussion in point 3.2 in this chapter). In terms of CoPs in organizations, the applications and implications of CoPs are manifold, as evidenced by the literature review. For the purpose of this research, the concept is narrowed down as locus of encounter and learning among heterogeneous stakeholders who bring resources. In this theoretical framework, stakeholders may come into contact in a CoP because of their interest in investing resources for conducting specific transactions. Therefore, the domain needs to be identified in relation to a very specific transaction that is to be carried out. In the context of a transaction, heterogeneous stakeholders may form a (temporary) community, also referred to here as a temporary mini-society in relation to a transaction. The practices that may result are therefore directly geared towards the fulfilment of the transaction.

To sum up, as for the conceptual changes with respect to the existing elaborations on CoP in the organizational literature, transactions would be at the centre of CoPs and the latter would be defined as locus for the relationalization of multiple rationalities necessary for conducting transactions.

6. Integration of CoPs in the Organizational Transcultural Learning Model

The present elaboration aimed to explore the conceptual basis for CoPs as loci of operationalization of organizational learning, which is conceived as relationalization of multiple rationalities in organizations. The conceptual fit for arguing for CoPs as loci of learning has been strengthened in the analysis of the conceptual connections between the transcultural learning model and CoPs. Nevertheless, some conceptual changes were also highlighted to further the suitability of CoPs as loci of contact in the present research. These changes mainly relate to the nature of organization. In this research, organization is not understood as a constellation of practices, and practices are not at the centre of organization. The organization is understood here as an entity in its own right that forms a nexus of stakeholders´ resources. These use the entity for conducting transactions. Practices are then instrumental in enabling transactions. A community of practice can enable the operationalization of organizational learning as conceived in this research insofar as it provides a locus where heterogeneous stakeholders who invest resources can come into contact and their rationalities can be relationalized.

The learning process (i.e., relationalization of rationalities) may start with a shared domain and the associated socialization of community members in the context of an organizational CoP (Figure 17). The members of a CoP are connected through transactions. The members of the CoP bring their rationalities to the transaction. Drawing on the contact hypothesis theory, non-normativity in a place characterized by high heterogeneity can be promoted through contact between these heterogeneous stakeholders. In addition to non-normativity, intrinsic pro-sociality can promote a cross-categorization process and the development of a mini-society (sense of “we-ness”). Cross-categorization may strengthen relational-based ties, thereby developing a shared understanding of the modus operandi for carrying out specific tasks required to complete joint organizational transactions. It is a relational and dynamic process that begins with heterogeneous stakeholders using the organization and investing their resources in the transaction. The transaction represents the initial commonality. The practices developed represent new commonalities to pursue the joint transaction. The learning process is also a situated process, as the development of practices takes place in very specific contexts (Wenger 1998; Wenger et al. 2002; Tsoukas 1996), in this case the context of the organizational transaction.

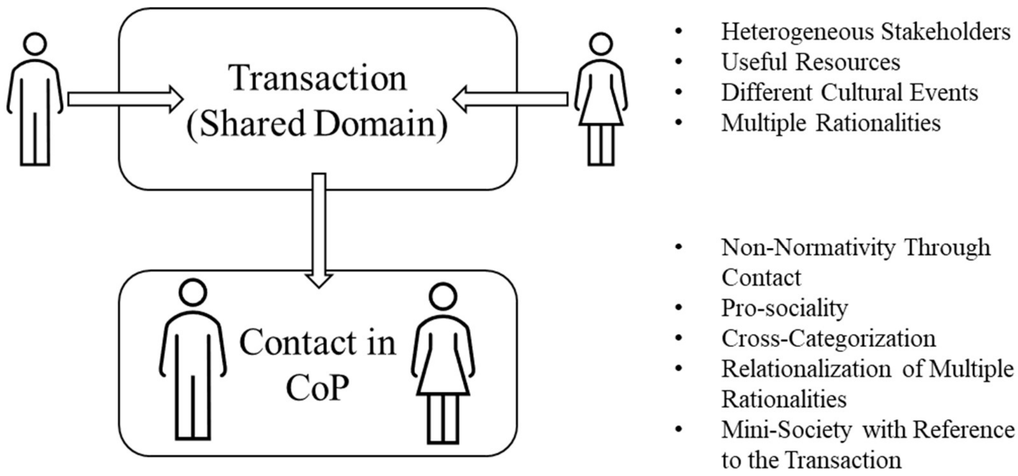

Figure 17: Contact Between Heterogenous Stakeholders at CoP. Source: Own illustration.

The development of new commonalities (practices) in a situated learning context would lead to new shared meanings. The shared meanings that emerge are not “stable properties” belonging to individual stakeholders, but rather the result of engagement (cf. Orlikowski 2002), collective competences (Orlikowski 2002), socially constructed processes (Burr 2003), mindful interactions (Weick

& Roberts 1993), which can be the pillars of a temporary mini-society (Wieland 2020a) of the joint agent "we". In this sense, commonalities can be a proxy for the relationalization of multiple rationalities -- a proxy because commonalities can detect an unobservable relationalization.

Such an organizational learning process is not a cognitive process but a relational process. It does not follow a methodological individualist approach, but a relational one. The focus is not on what is learned by the parts that make up the system, but on their relationalization. Following network theory, this would be a process that focuses on the ties between nodes rather than on the nodes, without neglecting the existence of the nodes. This is not to say that the nodes (in this case the stakeholders and their resources) are not relevant to the learning process, but to distinguish the learning of the individual nodes (the stakeholders) from the learning of the network (the organization as nexus).

These discussions imply a revision of the model of transcultural learning (Figure 18).

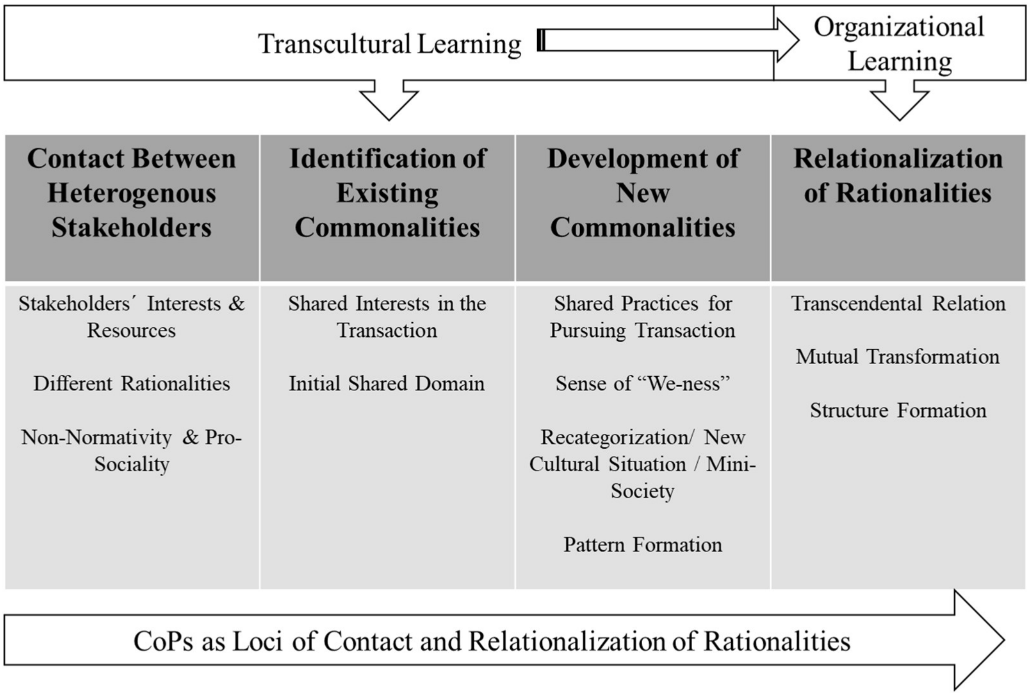

Figure 18: CoPs in the Transcultural Learning Model. Source: Adapted from Wieland (2019).

The first change concerns the inclusion of CoPs in the roots of the model. It is important to highlight that the concept of CoPs was also included in the revision of the model proposed by Baumann Montecinos (2022). In this revision, the researcher included CoPs in the third step, namely the development of new commonalities (see Figure 11 in chapter five). However, the literature review on CoPs presented and discussed in this research points to the role of CoPs as loci of contact and relationalization of rationalities, a relational space. Thus, if a community of practice is the locus of learning, it underlies the whole learning process and is not limited to one step.

For the adaptation of the model for the definition of organizational learning as proposed in this research, the steps were also revised. The first step of the transcultural learning process is contact between heterogeneous stakeholders who invest their interests and resources and bring different rationalities to transactions. This contact can take place in either a physical or virtual CoP. Contact between heterogeneous stakeholders would be moderated by pro-sociality and non-normativity (contact hypothesis). A mediator, also defined as facilitator (Retna & Tee 2011), boundary spanner (Heikkila & Gurlak 2013), experts with intermediary functions (Kislov 2014; Zaheer & Bell 2005), system convener (Wenger et al. 2015) and hub firms in the case of inter-organizational networks (Gibb et al. 2017) can facilitate the brokering between heterogenous stakeholders. The mediator should have the competences to create the conditions for “equality”, in the sense of non-normativity (see Figure 16 in this chapter). When stakeholders from different systems are involved, polylingual competence would be essential.

The contact in the locus of CoPs may offer opportunities to acquaintance. Since stakeholders invest their interests and resources in organizational transactions because they expect a return (tangible or intangible), their initial shared domain (or commonality) aligns with their common interest in the transactions (even though the interests of different stakeholders may be different, they all expect a return and therefore have a common interest in a successful transaction). This common interest may motivate stakeholders to cooperate to develop the shared practices required to pursue their shared domain (the transaction). In the intra-organizational transactions, a common domain could be the completion of a specific project, the development of a product, the elaboration of a strategic plan, entry into a new market, the organization of an event, the elaboration of a financial plan, and so on. In transactions that also involve stakeholders beyond institutional boundaries, a common domain could be the development of a common technology, access to new markets, an event in the local community etc. Shared developed practices may represent new commonalities with reference to the very specific joint transaction. These shared practices would be the result of the interaction between heterogenous stakeholders that may belong to different systems (polycontextuality) and who bring different language games (polylinguality) and decision logics (polycontexturality). While the relationalization of multiple logics would not change their systems of reference and language games (stakeholders like NGOs will still belong to civil society and apply the binary-code engagement-non engagement), practices developed in such CoPs may imply mixed decision logics. In the process of jointly developing practice, cross-categorization may lead stakeholders to develop a sense of "we-ness" that transcends single stakeholders ("I" and "you") and form a mini-society with reference to transactions. As different rationalities are relationalized in the framework of the transaction, the transcultural learning model potentially leads to new patterns being formed. These should be stabilized. In the process of stabilizing patterns, CoPs would be an instrument of polycentric and relational governance, thereby reinforcing the permanent governance structure that allows the continuity of transactions over time. Relational governance is a self-unfolding process (Wieland 2022). CoPs as a mechanism that is to be cultivated makes it an appropriate (at least theoretically) mechanism for supporting a self-unfolding process. This structure formation would be the result of the relationalization of rationalities and would regard the organization as entity (meso level).

Unlike the original model of transcultural learning, the proposed version adds another step, namely the relationalization of rationalities. The first part of the model (first three steps) serves as a tool for relationalizing rationalities. Heterogeneous stakeholders have "contact" and, through a cross-categorization process based on their shared domain, a mini-society emerges with reference to the shared domain. This part concerns pattern formation. In the second part (last step), pattern formation is stabilized in the organization (structure formation).

7. Assessing Organizational Learning

In terms of indicators for assessing organizational learning, it was outlined in chapter one that different organizations have different binary codes. These different binary codes represent the indicators of success criteria. In the example of firms, the binary code is cost-earnings. Accordingly, the learning process is successful if it has a positive impact on the difference earning - costs. Organizational learning as a process for the relationalization of rationalities generates costs. These costs (or at least some of them) can be categorized as "relational costs". The latter are defined as "costs that a given organization has to pay in order to continually fulfil the purpose of its existence¸ namely interacting with stakeholders and their resources. More specifically, they are the costs incurred by generating and maintaining the willingness and ability to cooperate" (Wieland 2020a: 149), thereby enhancing cooperation corridors (Wieland 2022). Costs generated by organizational learning processes, especially those learning processes for ensuring cooperation among heterogeneous stakeholders that bring resources, are relational costs (ibid.). These are the costs of investment in organizational capital, understood as the organization's ability to mobilize and sustain processes to implement its strategy (Terziev et al. 2020), and therefore keep existing. Put in the terminology of this research, these costs would ensure the suitability of the governance structure in stabilizing the relationalization of rationalities. Against this background, organizational learning would be successful if the rents generated by the relationalization of multiple rationalities and the associated increased capacity for cooperation through an expansion of the cooperation corridors were more than proportional to the cost increases caused by organizational learning. To put it into an economic formula, the assessment of organizational learning would be:

$CR_L - RC_L > 0$ (Successful organizational learning)
$CR_L - RC_L < 0$ (Failure of organizational learning)
$CR_L - RC_L = 0$ (No relevant impact)

Where:

$CR_L =$ Cooperation rent generated as a result of organizational learning
$RC_L =$ Relational costs generated by organizational learning

While the costs (or part of them) of implementing organizational learning can be quantified using traditional accounting methods, the main difficulty in assessing organizational learning is quantifying cooperation rents generated as result of organizational learning. This would require a two-step process: First, the cooperation rent must be quantified. Second, the amount of cooperation rent associated with enhanced ability to cooperate as a result of organizational learning needs to be quantified. Ability to cooperate is an intangible resource. While intangible assets are critical for long-term value creation in the knowledge economy (Terzeiv et al. 2020; Wenger et al. 2002), there is a lack of measurement tools that can effectively measure the value of intangible and non-financial assets (Glavan 2011; Möhrer 2022). Non-metricized intangible assets account for more than 75% of the value of organizations (Terziev 2020). In fact, a relevant part of the value created by organizations is not captured in current accounting systems (Möhrer 2022). This has led to the phenomenon of the hidden value of organizations (ibid.). As a result, there is a lack of accounting tools to measure the effective value created by organizations (ibid.). This can hinder the assessment of cooperation rents generated by organizational learning.

In terms of value created through organizational learning, some scholars suggest that intangible outcomes of organizational transactions can be assessed using traditional metrics such as key performance indicators or performance measures (Venkatraman & Venkatraman 2018). With regard to organizational learning, the following indicators have been suggested: Number of contributions, contribution rate over time, number of problems resolved, time taken to resolve, savings in time/money, improvement in quality/efficiency (ibid.:16). However, other scholars argue that knowledge, but also the ability to cooperate and intangible assets in general, are treated "too much like a conventional asset with a specific and stable market value" (Wenger et al 2002: 176). They argue that traditional organizational measurement instruments are not able to capture the value of these assets and emphasize the necessity of innovative measurement techniques (Wenger & Snyder 2000; Wenger et al 2002).

This debate in the literature highlights that while there is a broad consensus on the importance of intangible assets in a knowledge economy, on the other hand, classical quantitative instruments are still used to measure the value they create. In the knowledge management literature, some scholars called for an alternative metric to assess knowledge value. Wenger et al. (2002), for instance, proposed the method of storytelling. The scholars proposed three elements for the metric of storytelling (ibid.):

- Knowledge development activities
- Knowledge generated by these activities
- Knowledge applied to create value

It can be argued that such a qualitative measure could also be applied to other intangibles, such as the ability to cooperate. If "knowledge" is replaced by "ability to cooperate", the three elements would thus be:

- Ability-to-cooperate development activities
- Ability-to-cooperate improved by these activities
- Ability-to-cooperate applied to create value

Wenger et al. (2002) were not alone in pointing out the potential of such a methodology. Weick & Roberts (1993) underline that storytelling can "(…)

organize know-how, tacit knowledge, nuance, sequence, multiple causation, means-end relations, and consequences into a memorable plot" (Weick & Roberts 1993: 368). From this perspective, stories can be considered as what Brown & Duguid define as "repositories of accumulated wisdom" (Brown & Duguid 1991: 45). In addition to their metric function, some scholars emphasize that storytelling itself can create value by enabling the sharing of experiences and fostering the development of a common interpretation and thus a shared conceptual world (Brown & Duguid 1991).

Such qualitative metric approaches, on the one hand, would provide an overview of the impact of improved ability to cooperate on the value creation process and raise awareness of the impact of organizational learning initiatives on the organization. But, on the other hand, the difference $CR_L - RC_L$ would not be quantified. For measuring cooperation rent generated by organizational learning, the income-based theory of shared value and the shared value statement may offer interesting insights (Möhrer 2022). In general, these instruments focus on the resource invested and value created for different stakeholders. They take into account both tangible and intangible values invested in the firm by stakeholders and thus contribute to measuring the overall performance of the organization (ibid.). The Shared Value Statement consists of three parts (Möhrer 2022):

- Performance Statement
- Cost Statement
- Stakeholder Income Statement

Figure 19 provides an example of such a shared value statement. Möhrer (2022) argues that the intangible incomes represent the cooperation rent.

Against this background, applying the shared value statement to organizational learning would allow one to calculate CR_L. In this way, all variables (or at least part of them) for assessing organizational learning as $CR_L - RC_L$ could be quantifiable. In the shared value statement (Figure 19), the organization is also included among the stakeholders. Marco Möhrer (2022), drawing on the firm as entity in its own right, proposes considering the organization as a separate stakeholder. The stakeholder "organization" invests in the governance structure and therefore obtains a rent for that (ibid.). The organization is a stakeholder that consists of a nexus of stakeholders.

Viewing the organization as a separate stakeholder would also make it possible to distinguish the cooperation rent resulting from organizational learning in:

$CR_L \rightarrow$ Obtained by the organization as stakeholder

$CR_L \rightarrow$ Obtained by all other stakeholders that composed the nexus

Measuring the impact of learning would require further research. In particular, a longitudinal study would provide a more detailed analysis of the impact of relational learning on organizational relational costs and cooperation rents resulted from organizational learning. This longitudinal analysis should take into account how cooperation rents change through the application of measures aimed at optimizing the relationalization.

Shared Value Statement		
Performance Statement		
	Sales	
+	Other operating revenues	
+	Revenues from investments	
+	Revenues from intangible assets	
+	Extraordinary revenues	
=	**Shared Value (Total Performance)**	
Cost Statement		
	Factor costs:	*Company expenses (excluding CSR expenses)*
+	Relational costs:	*CSR expenses*
=	**Organizational Costs**	
Stakeholder Income Statement		
	Suppliers	
	Factor incomes:	***Sales from inputs***
	+ Cooperation rents:	***Benefits from participating in seminars and trainings, e.g., in the areas of environmental protection and human rights, investments in joint CSR projects, etc.***
	= Stakeholder Income Suppliers	
+	Employees	
	Factor incomes:	***Net wages, wage taxes withheld, contributions to social security withheld, wage replacement benefits, pension accruals***
	+ Cooperation rents:	***Benefits from vocational training, voluntary social benefits, benefits from programs on employee health and work saftey, investments in family-firiendly working conditions, diversity, etc.***
	= Stakeholder Income Employees	
+	Community/State	
	Factor incomes:	***Income taxes, indirect and deferred taxes, other public charges and duties***
	+ Cooperation rents:	***Benefits from corporate social responsibility activities, investments in environmental protection, etc.***
	= Stakeholder Income Community/State	
+	Capital Providers	
	Factor incomes:	***Interests paid to banks and other creditors, dividends and other payments to shareholders***
	+ Cooperation rents:	***Benefits from company investments in CSR-related governance structures, ValuesManagementSystems ZfW, extended compliance programs, etc.***
	= Stakeholder Income Capital Providers	
+	Customers	
	Factor incomes:	***Discounts, allowances or credit notes***
	+ Cooperation rents:	***Benefits from special customer events, dialog platforms, company investments in customer trainings for product safety and application, voluntary non-cash benefits, etc.***
	= Stakeholder Income Customers	
+	Organization	
	Factor incomes:	***Retained earnings required by law or company constitution, depreciation and amortization***
	+ Cooperation rents:	***Voluntary retained earnings***
	= Stakeholder Income Organization	
=	**Stakeholer Income**	

Figure 19: Example of Shared Value Statement. Source: Möhrer (2022: 125).

Chapter Seven

Empirical Study on Organizational Learning as a Relational Process

1. Introduction

Throughout this research, organizational learning has been described as a process for relationalizing multiple rationalities to conduct transactions. This conceptualization required a methodological shift from methodological individualism to methodological relationism. In methodological relationalism, organizational learning would be defined neither in terms of the components of the organization (stakeholders or stakeholders´ resources) nor as a phenomenon detached from its components. Rather, it would involve a process of micro-meso-relationalization. In such a process, the system (nexus of stakeholders´ resources) and its parts (stakeholders and their resources) change.

Behind the concept of organizational learning as developed in this research is the nature of the organization as an entity in its own right that forms a nexus of stakeholders (Wieland 2020a). Stakeholders have diverse interests and resources that are invested in the collaborative project (the organization) to conduct specific transactions. The organization as an entity in its own right provides a governance structure for the execution of transactions.

In chapter five, the model of transcultural learning was presented as a scheme for operationalizing organizational learning as defined in this research. Namely, through the steps of the TLM, the multiple rationalities of heterogeneous stakeholders could be relationalized. Following the contact hypothesis, it was argued that such relationalization requires contact. The concept of CoPs was then introduced in chapter six. CoPs have been defined as relational spaces, as loci of contact and learning. Conceptual changes and connections between the transcultural learning model and CoPs enabled the concept of CoPs to be incorporated into the transcultural learning model. Figure 18 in chapter six shows an adapted version of the transcultural learning model. In addition to the further elaboration on the three original steps, another step was added to the model (relationalization of rationalities). In the updated version of the model, contact, non-normativity and pro-sociality in the context of a relational space (CoP) would lead to a temporary mini-society and the formation of new patterns as a result of a recategorization. The stabilization of relationalized rationalities at the organization would lead to structure formation. The elaboration of the model concludes with an elaboration on how to assess organizational learning.

The following section presents the results of an empirical study conducted in a global organizational setting. The aim of the chapter is to provide empirical evidence for the applicability of organizational learning as conceptualized in this research in an organizational real setting.

2. Study

The unit of analysis of the empirical study is a global and diversified intra-organizational network (hereafter referred to as ION to preserve anonymity). At the time of the collection of the research data (2020), the ION comprises 20 subsidiaries around the world. The 20 subsidiaries are divided into four main foci areas (not disclosed here to preserve anonymity) and are connected to a broader nexus of stakeholders beyond the organization's institutional boundaries. The ION aims to drive global and local ecosystems, enabling the company to innovate, grow and succeed (company communication).

The ION was not chosen at random for this research. The researcher conducted fieldwork in one of the subsidiaries on the topic of transcultural learning (citation omitted here for reasons of anonymity), which highlighted the existence of the ION. In particular, one of the findings of the field research project was that the ION seems to play an important role for success in both the subsidiaries, in the whole organization and in its connection with external stakeholders. The findings showed that the learning process is a mutual transformation of stakeholders who invest resources and the organization. The organizational system fosters the development and transformation of the stakeholders (aimed at obtaining a rent from their resources for conducting transactions) and the stakeholders with their resources contribute to the development and transformation of the organizational system. The learning process was defined by one interviewee as a "win-win for all [everyone]" (quote omitted for anonymity: 255), where "all [everyone]" means both the organization and its stakeholders. The study also found that the transcultural learning model was applied in the organization. These initial findings represent a potential good example of organizational learning as a relational learning process. Therefore, the research was extended to the whole ION in this PhD project. The extension of the research aims to empirically verify the organizational learning process in the ION as a process for the relationalization of rationalities.

3. Methodology

A qualitative methodology was used. Semi-structured interviews formed the first source of data. The method of semi-structured interviews consists of using an interview guide and focusing on a specific research topic (Kvale 1996). This method was chosen because it allows the phenomenon being studied to be understood from the perspective of the interviewee (ibid.). To a small extent, the data source was supplemented by public documents from the organization (triangulation).

For the sampling, the organization was contacted and asked for the opportunity to conduct interviews with some of the managing directors of the 20 subsidiaries. The final sample consisted of six managing directors (MDs) (30% of the subsidiaries). In the presentation of the results, the interviewees are reported as interviewee A, B, C, D, E and F. The sample includes managing directors from subsidiaries in Europe, Asia, North and South America. Two of the interviewees were women and four were men. An informed consent document was sent to all participants prior to the interviews. This document contained information about the study procedure, confidentiality and voluntary participation (see appendix). All participants signed and sent their consent to participate in the study before the interview. Due to the heterogeneous language background of the respondents, all interviews were conducted in English. English is not the native language of all interviewees. This means that some linguistic and grammatical errors or cases of non-standard usage may have been made during the interview. In this research, naturalized transcription was used, which means that the linguistic and grammatical errors or caswsnof non-standard usage were not corrected. In this way, the original conversation with the interviewees was reproduced and the meaning was not filtered in the transcription by the researcher (Oliver et al. 2005). Only if the meaning of the sentence was not understandable was an explanation put between (). In some cases, to make the sense of the sentence clear, in the chapter (but not in the transcription in the appendix, which contains the original conversation) some words/expressions put into [] were changed. Sensitive information was anonymized to protect the identity of the respondents (also put between []). The distinction between anonymized and changed words/sentences put into [] is that by changed sentences the original sentence is reported in a footnote. In case of a quote in which more than one word was changed, the footnote is put in the last changed word. The interviews were conducted by the researcher between June and September 2020. They were done remotely. Each of them lasted on average about fifty-seven minutes. The interviews were recorded and transcribed verbatim by the researcher. The transcriptions were analyzed using the software programme MAXQDA.

Narrative analysis was used to analyze the interviews. In narrative analysis, the findings of the study emerge as a result of the story told by the interviewees and the analysis aims to create a coherent story (Brinkmann & Kvale 2018; Czarniawska 2004). Following a postmodern approach, meaning was created through conversation in the context of the interviews[38]. Therefore, the results section will focus on what was said during the interviews. In a narrative analysis, the meaning of the text depends on the questions posed, as different questions lead to different meanings (Kvale 1996). Kvale (1996) defines this as plurality of interpretations:

> "In current interview research the variety of interpretations is not the main problem, but rather a lack of explicit formulation of the research questions to a text (….). With an explication of the perspectives adopted toward an interview text and a specification of the researcher´s questions posed to an interview passage, several interpretations of the same text will not be a weakness, but a richness and a strength of interview research." (Kvale 1996: 212)

Questions posed to the text and the context of interpretation depend on the theoretical presupposition on the basis of the research project (Kvale 1996). The aim of the analysis was to deductively test the concept of organizational learning as defined in this thesis in a real organizational setting. In this research, the

[38] Kvale (1996) uses the miner and traveller metaphors for defining the approaches to interview research. While the first is aimed at uncovering real and true meanings, the traveller presupposes a relational approach to meaning creation through interview conversations. This latter follows a post-modern approach where the interviewer participates in the meaning development in an inter relational construction of meaning during interviews.

meanings of the interview are interpreted into the theoretical framework of organizational learning as elaborated in the previous chapters. Realist reading (Kvale 1996) of the interview transcripts was applied in the analysis process. The latter means that the perspective of the "natives" (in this case managing directors) was sought.

Against this background, and with the aim of empirically testing organizational learning as developed in this research, the main question that guided the interview analysis was:

> Does organizational learning (as defined in this research) take place at the ION? and, if so, how?

This central (and broad) research question was then broken down into more specific sub-questions. Within relational economics, the organization is defined as a nexus of stakeholders´ resources. Organizational learning, conceptualized in this theoretical framework, relates to this nexus. Therefore, in order to empirically test organizational learning as the learning of the nexus, the stakeholders´ resources nexus needs to be defined. The first derived sub-question was:

> A. Which stakeholders compose the nexus of the ION? Which resources do they invest in the organization?

In relational economics theory, stakeholders invest their resources in the organization, which provides a governance structure (and forms an entity in its own right). Organizational learning has been described here as the relationalization of multiple rationalities for conducting organizational transactions. Relationalization of rationalities leads to temporalized pattern formation. Governance structures enable the stabilization of patterns. In order to understand organizational learning as defined here, it is therefore important to better understand the governance structure of the ION. Therefore, a second question was derived:

> B. What is the governance structure of the ION?

After conceptualizing organizational learning within the framework of relational economics, e.g., elaborating the implications of concepts such as nexus of stakeholders´ resources, governance structure and the organization as an entity in its own right, the model of transcultural learning was applied in combination with the concept of COP to operationalize learning in organizations. Therefore, after presenting the nexus and structure of the the ION, the following question was asked:

C. Does the transcultural learning model take place at the ION? and if so, how?

It has been argued that the success criteria of organizational learning depend on the guiding difference. Organizations operating in different systems have different guiding differences and may measure the success of learning differently. The ION is a business organization that operates in the market system and applies the guiding difference “earnings-costs”. As an organization operating in the market, it may invest in learning if the returns associated with learning are higher compared to the costs. The costs and returns associated with learning as a relationalization of multiple rationalities may regard the generated cooperation rent and/or the reduction of relational costs incurred by the successful relationalization of multiple rationalities. In chapter six, it has been argued that organizational learning will be successful if $CR_L - RC_L > 0$, which would lead to an improvement of the organizational performance. To analyze the impacts of learning at the ION on the organizational performance, the following question was derived:

D. What is the impact of learning in the context of the ION on organizational performance?

Following Wenger & Snyder (2000), Wenger et al. (2002), Weick & Roberts (1993) Brown & Duguid (1991) a storytelling approach was adopted to analyze the impact of learning on organizational performance. Managing directors' narratives about the ION's KPIs and about the impact of learning at the ION on organizational performance were used for analyzing the benefits and success of relational learning at the ION.

4. *Results*

The results of the study are structured according to the sub-research questions. For each research question, the results are presented and discussed.

4.1 The ION´s Nexus of Stakeholders

The ION is an intra-organizational network formally composed of the MDs of twenty subsidiaries around the world. At first glance, it could be described as a purely internal structure. Yet the ION's boundaries are somehow flexible. Data analysis shows its connection to other systems (polycontextuality):

> “(…) it is not just that you run (the subsidiary) with closed eyes but you have to have that connection with your field.” (Interviewee F)

> “There´s a lot of work at the eco-system outside, you know, so this is something that we foster at the [ION].” (Interviewee C)

The ION is integrated into a more complex nexus of stakeholders, an inter-organizational system, which in turn is integrated into a societal system. Subsidiaries are linked to other stakeholders belonging to broader societal and economic systems. Although the stakeholders of the general ecosystem are not formally involved in the ION, the different rationalities brought by stakeholders outside the institutional boundaries influence the activities of the ION. Following Wenger et al. (2002), the ION presents itself as an institutionalized and designed intra-organizational structure. Nevertheless, the extended knowledge system (ibid.) goes beyond the design structure and involves external stakeholders.

The relevance of the organization as a nexus of stakeholders´ resources is formalized in the organization through the KPI “growing relationships with the local eco-system”[39]. This means that the performance of each subsidiary and MD is also measured by their willingness and ability to cooperate with stakeholders in the ecosystem. The relevance of this KPI also reflects the time and resources spent on building successful collaboration with the overall organizational stakeholder network, as confirmed by various interviewees:

> “If you look at my calendar, a lot of my time is also spent talking to customers, a lot of my time is spent to talking to government organizations like [name]. (It) is an industry body in [location] where the top [sector] companies [come] together, [deliberate] on some of the regulations, measures that we [take] and

[39] The relevance of the eco-system was highlighted by 100% of the interviewees.

> I represent [organization´s name] at that body, or I work with the [local] chamber of commerce (…).” (Interviewee F)[40]

> “One (important competence of MDs) is to be able to [make][41] connections across (…). That connection piece that I spoke about earlier is very very important. Being able to be a spokesperson and advocate, an ambassador of [organization´s name] but also of the location. I spend a good portion of time being out there as thought leader on different topics, to be representing [organization´s name], showing up in the ecosystem, identifying opportunities where we can give back and show up in a way that is the most meaningful is another important competence.” (Interviewee A)

> “I am also in connection with lot of MDs from [organization´s country of origin] companies who are located in [country]; that´s a network I regularly use because I also learn about, because I was bit away from [country] for 8 years, so there is a lot of learning involved to understand some of the operative procedures and local guidelines and regulations.” (Interviewee F)

It is also interesting to note how the interviewees, especially the first quote by interviewee F, highlight polycontextuality, polycontexturaliry and polylinguality. Government, customers and industry bodies are stakeholders from different systems that apply different language games and logics. The transactions that include the resources of these stakeholders are characterized by different rationalities. Such transactions may be successful insofar as they relationalize the rationalities, bring together different expectations and interests, different language games, different logics.

To answer the sub-question “which stakeholders composed the nexus of the ION? Which resources do they invest in the organization?” more precisely, the analysis of the interviews also aimed to better understand which stakeholders form the nexus of the ION (identification of stakeholders) and what importance they have for the ION (prioritization of stakeholders). Both aspects are discussed below.

[40] [come] replaced “are coming”, [deliberate] replaced “deliberating”, [take] replaced “are taking”.

[41] [make] replaced “do”.

4.1.1 Identification of Stakeholders

The stakeholders, who form the organizational nexus of stakeholders, are part of the nexus insofar as they make a contribution with resources (tangible or intangible) that are essential for the organization's transactions. Therefore, stakeholders need to be identified and prioritized (Wieland 2020a). The interviews provide information to draw the stakeholder nexus of the ION and thereby understand which stakeholders are identified by the organization.

One of the interviewees named the most important stakeholders in the ecosystem. These stakeholders are defined as “pillars” by the interviewee:

> “The first pillar is government associations; we have a lot of associations. The second pillar is the customer, the third pillar is partners, we work together with our partners to make things happens, the fourth pillar is start-ups and the last one is the university.” (Interviewee B)

The definition of the ION’s stakeholders as “pillars” underlines their importance to the organization and is further evidence of the concept of the organization as a nexus of stakeholders. Other respondents also mentioned employees (all respondents), the Chamber of Trade and Commerce (respondents D and F) and the community (respondents A and D) as organizational stakeholders.

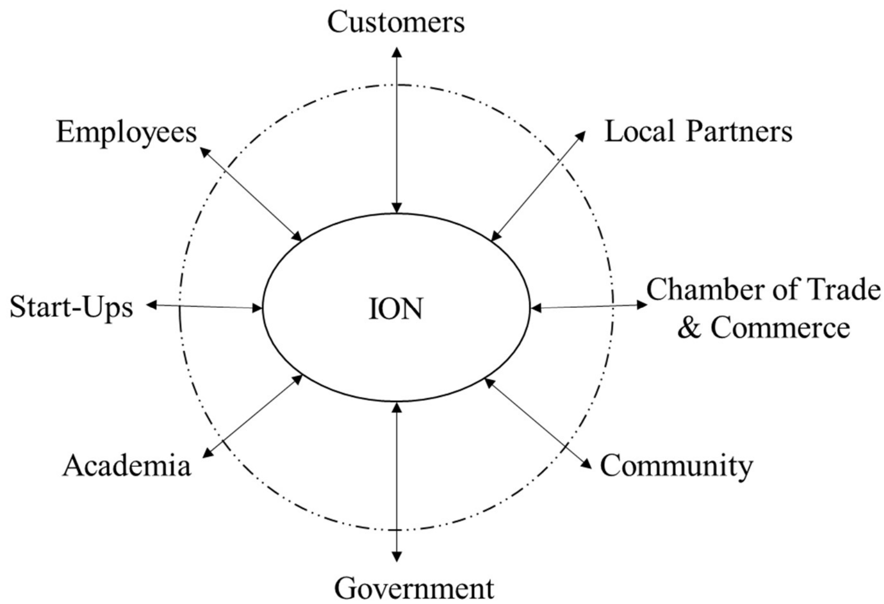

Figure 20: ION´s Nexus of Stakeholders. Source: Own illustration.

As for employees, they were not mentioned as stakeholders of the ecosystem as they are considered internal to the organization. However, the organization has a KPI on “employee engagement”. This KPI highlights that the organization's performance is also measured by its willingness and ability to engage employees, which could underline the role of employees as stakeholders.

Stakeholder identification allows us to draw the nexus of the ION's stakeholders (see Figure 20).

4.1.2 Prioritization of Stakeholders

The prioritization of stakeholders depends on the specificity of the resources brought into the transaction, the temporal duration of the relation (short or long term) and the willingness and ability to cooperate (Wieland 2020a: 80). Quotes from the interviews related to the eight identified groups of stakeholders are presented below. The quotes give voice to the interviewees and allow the level of importance of the different stakeholders and their contribution to business performance to be captured. To strengthen the validity of the results, quotes from different interviewees are presented for each stakeholder, demonstrating the consensus on the relevance of specific stakeholders among interviewees.

Start-Ups

> “We have a start up study that has about 78 seats where start ups, especially start ups in the B-to-B tech space, we [incubate][42] them, we are working with them, and many times this is also a great playground for innovative ideas to come up.” (Interviewee F)

> “We participate in numerous events and even now I give lectures to [location] and [country´s name] communities in start-ups. (…) In these lectures I explain how [organization´s name] worldwide is working with start-up eco-systems, for instance, how we collaborate, how we cooperate, the small start-ups, flexible versus very structured positions.” (Interviewee D)

> “Bringing in the start-up ecosystem into the [subsidiary] we can see examples of start-ups that are just very agile, that have a mindset that is so much

[42] [incubate] replaced “are incubating”.

> entrepreneurial, so that people can be… the employees can relate to, ok?" (Interviewee A)

> "This is an example of how we help each other: Next time they will come to me with a topic, (they will) just have another request, "oh, we have some great start ups in [location] for industry 4.0, we would like to connect with top [location] customers because we know that they are now renewing their IT infrastructure and we want to present them something very modern and can you help us?" (Interviewee D)

From the quotes it emerges that the resources brought to the organizational transactions by the stakeholder "start-up" are know-how, agility, innovative ideas, flexibility, inter alia. Incubators (interviewee A), participation in events (interviewee D) and direct cooperation with start-up are the initiatives mentioned to engage with start-ups. As for the direct cooperation with start ups, interviewee F emphasizes that we – the ION – are working with them (start-ups). Interviewee D in the first quote also highlights that in lectures he/she explains how to work with start-ups. In the second quote by interviewee D, he/she provides an example of how start-ups may help in specific topics.

The quote from interviewee A also underlines how the stakeholder "start-ups" is related to the stakeholder "employee". And the second quote from interviewee D points out the connection between start-ups and customers. This underlines that in a nexus of stakeholders, it is not the organization (in this case the ION) that is bilaterally linked to its stakeholders, but as a nexus of stakeholders, the stakeholders are linked to each other in performing transactions. The ION does not promote this nexus for its own sake, but to promote innovation, agility and flexibility. Indeed, from the interviews it can be seen that start-ups offer the *playground for innovative ideas (at the subsidiaries of the ION) to come out*, foster a certain *mindset* among the ION´s employees, help building solutions for the ION´s customers, inter alia.

Customers

> "We have a space in which we collaborate with our customers, for example to share ideas, to organize workshops and our common approach is that we organize so-called customer engagement centers in different countries, it looks different (in each location) but in essence it is a place where we present our [products] in a fancy, nice way with multiple shows." (Interviewee E)

> "I'll give you an example, were about to run a [name of an event to engage with customers]. So, we organized this entire day of learning (…). Well, we are going to bring a local customer that is going to tell their story and their journey having the employees here, the good, bad and ugly experiences that customers have had with our [products] is a great thing and helps them to build empathy and understand who they are building for." (Interviewee A)

From the quotes it emerges that in addition to the resource "payment" (Wieland 2020a), customers can also contribute other resources such as ideas and experiences. Customers' ideas and experiences contribute to the ION's learning, as interviewee A explicitly pointed out, thus empirically supporting the concept of the extended knowledge system (Wenger et al. 2002). Customers' ideas and experiences enable the ION to know who they are "building for". In the long run, engaging with customers can increase customer satisfaction and contribute positively to the positive balance of "earnings-costs", highlighting the priority of this category of stakeholders.

Government

> "You need to behave with the government. (…). Around us there is a quite a lot of government." (Interviewee B)

> "We really take public officials from the Ministry of Finance, for example, to our events and this public official uses our stage and platform to communicate and the customers get the feeling that we [cooperate closely] with the Ministry and that we are able to implement the legal changes into our [products] [at the] right point [in][43] time." (Interviewee D)

> "Now just reflecting back [on][44] these Covid times, we have been working a lot with the local government here." (Interviewee F)

The government is a political stakeholder operating in the system of "politics". Transactions with stakeholders from other systems require polylingual skills. The quote from interviewee B underlines the need to behave with the government, highlighting its high priority as a stakeholder, and the need for continuity. It emerged from the interviews that engagement with government varies by location and the resources that the stakeholder "government" can bring

[43] [cooperate closely] replaces "close cooperate", [at the] replaced "in a", [in] replaced "of".
[44] [on] replaced "into".

to the transaction can also vary. Apart from resources such as public services and infrastructure, in some locations the government also provides legitimate resources, as shown in quote B *(our customers get the feeling that we cooperate closely with the Ministry and that we are able to implement legal changes into our [products] at the right point in time*). As can be seen from interviewee F's quote, in certain situations (such as during the COVID pandemic) cooperation with the government can be even more intense.

Academia

> “We have now identified some of the top universities. In [location] we identified about five universities that we will work with in very close proximity and across the world we identified 16 universities. So, the [name of an initiative] laid out guidelines for every location to follow in terms of how we build that engagement, how we build that deep relationship with the university.” (Interviewee F)

> “Working with the local universities to make sure that we are working as good partners with the universities, not just [to be] able to recruit from those universities, but also to show the top leaders, to give back, to be able to do sponsorships, do different things, innovation events, work with the local start-ups, sometimes, as you know, some of those universities will have local incubators that [are][45] part of the university. For us, making sure that we´re investing within the universities and getting closer to the students and working with professors to be good partners (is important).” (Interviewee A)

> “We have very strong relations to the universities, we take interns and students and give Masters’ theses to hundreds of people to build a pipeline for new hires, for new talents.” (Interviewee D)

> “I shared my experience in this university that I studied two years (…), there were a lot of students there, [they were] MBA students. And similarly, I do that in many universities. This is one way that we share our experiences, listen [to][46] them, learn from them and then we get, similarly, the opportunity to listen to some other leaders. (…) So it is a network impact.” (Interviewee C)

[45] [to be] replaced “for being”, [are] replaced “is”.

[46] [they were] replaced “it was”, [to] replaced “from”.

From the quotes, it emerges that universities are of high importance to the ION. It is clear from the quotes that cooperation with universities has a high value and is long-term. Interviewee F, for example, points to the existence of guidelines for *deep relationships with universities*. Interviewee D emphasizes the *very strong relationships to the universities*, confirmed by Interviewee F who talks about *close proximity* between the ION´s subsidiaries and academia. Interviewee A highlights the importance of *being good partners* with universities.

The interviews also shed light on how this engagement comes about, namely through formal partnerships such as the formal initiative mentioned by interviewee A, participation in academic events, assignment of topics for theses, etc. Talent is one of the most important resources of universities. But as can be seen from interviewee A's quote, engagement with academia also allows the ION to showcase itself (visibility), network and access incubators and start-ups, which also in this case highlights the connection between the different stakeholders in the nexus. In this context, interviewee C underlines the networking effects of collaboration with academia. Also in relation to academia, interviewees emphasize the learning effect (interviewee C), which reinforces the empirical support for the concept of the extended knowledge system.

Local Partners

> "The [subsidiary] is a kind of umbrella for corporate functions, development, support, partner services and co-innovation with the eco-system. So, the goal is develop, support, implement, help to run and engage with the eco-system, so not only do everything by ourselves, help partners to enrich our [products] and to integrate their products with our standards." (Interviewee D)

Partners are other organizations that cooperate with the ION's subsidiaries. Local partners were identified as one of the pillars for the ION (see quote from interviewee B in the section "stakeholder identification"). From the above quote from interviewee D, the relationship between the ION and partners is a two-way one: The ION provides services to its partners and the partners help to enrich the ION's products. In doing so, the partners invest resources such as know-how. The quote also highlights the "umbrella" function of the ION's subsidiaries, which can support co-innovation with the ecosystem (also across institutional boundaries).

Chamber of Trade & Commerce

> "There is a kind of KPI (…) to connect with the local chamber of trade and commerce. For instance, I am leading the [topic] committee in [country of origin of the organization]-[Location] chamber of commerce in [city] and there are also our seats on the board of the industry advisory council of the largest accelerating for start-ups and this kind of organizations." (Interviewee D)

> "I work with the [local] chamber of commerce where we have more than 4,500 [country of origin of the organization] companies." (Interviewee F)

Interviewees D and F emphasized the high priority of chambers of trade and commerce. Chambers of trade and commerce make it possible to network with further organizations (interviewee F, for example, speaks of 4,500 companies). Interviewee D also emphasizes that chambers of trade and commerce enable access to specific knowledge and competences (for instance through committees on specific topics). Also in this case the interconnection with different stakeholders is highlighted, in this case, with start-ups (quote from interviewee D).

Community

> "Start-ups, community, partners, anything that we do from a corporate social responsibility perspective." (Interviewee A)

> "It was quite interesting that one of the flavours[47] of the [subsidiary] in [location] is the connection with sport and entertainment industry, fan community." (Interviewee D)

Interviewee A linked community to corporate social responsibility. During the interview, interviewee D also emphasized the need to give back to the community, although he/she did not elaborate on it. Indeed, the ION as a firm is a societal institution and therefore is itself a stakeholder of society (Wieland 2020a). In order to survive in the long term, it must therefore create value for society (ibid.). Interviewee D provides a concrete example. In particular, interviewee D mentioned engagement with the sporting community.

[47] Interviewee D means flavour in the sense of foci, expertise.

Employees

As for the stakeholder “employees”, there is a specific KPI “employee engagement”. In the interviews, the importance and the way in which the stakeholder “employee” is engaged was specified:

> “(This KPI) is around driving engagement, to unify all of the employees in a single location to bring them together so they have opportunities to, maybe, meet someone new, collaborate in a new way, innovate together, maybe think a little bit differently because of a happy collision that might have happened because of an event where we brought everybody together. Sometime those events are around very specific topics, meeting important guests that have an important perspective, introducing employees to somebody that is new in a coffee corner, or it could be for an innovation opportunity, so sometimes we will host innovation events to bring everybody together, and sometimes it is just good social fun, summer parties or holiday parties.” (Interviewee A)

> “What is common across different regions is that we want to increase employees´ engagement so there are different initiatives that can be invented in different countries and whenever something is well receive by employees from that location we can exchange and implement the same in different countries.” (Interviewee E)

> “[Name of an organizational program], we have dedicated people whose full-time job (is) to put this program together. That´s wholly focused on making sure that interns that come into the organization have an experience that´s meaningful. Knowing full well that not all of them will stay at [organization´s name], some of them will graduate and go to other companies, somewhere they will talk about that experience, they might become customers one day, but a whole organization is focused on making sure that they have the best experience, that they are connected.” (Interviewee A)

> “When we had the chance to visit [one of the subsidiaries], we…I have seen how they engage people who are environmentally friendly, let´s say, ecologists. They built that space in the office where they could, for example, grow plants and invite other employees to share a kind of spirit, to have no waste, all the ecological aspects. And when I came back to my location, I raised this idea and quickly some people could also lead that, so that (the initiative) grew their engagement, and they quickly found ways of doing things differently in the [subsidiary].” (Interviewee E)

Organizational level initiatives to promote employee engagement aim to reinforce a sense of belonging to the organization, to something bigger, which is defined in theory as a “bigger formation” (Schramm 2022), in a way to create a sense of “we-ness”. The first quote by interviewee A indeed points out the relevance of bringing employees together. In the second quote, interviewee A mentions the whole organization, emphasizing the initiatives by the organzation as an entity to engage with the stakeholder “employees”. In the first quote by Interviewee E, he/she talks of “we” (the organization in different countries). As emerges from the second quote by interviewee E, there is also a continuous exchange on how to engage employees, and best practices are then applied in different locations.

In terms of benefits for the ION as an organizational entity, employee engagement can help employees to find new ways to cooperate and innovate (first quote from interviewee A). Internationally, this engagement can facilitate the transfer of innovations from one subsidiary to another (first quote from interviewee E). The prioritization of employees is also underlined by the resources invested by the organization. The second quote from interviewee A mentions full-time positions and programmes to promote employee engagement. Interns are considered a special category of employees. Intern engagement initiatives are based on the organization's awareness that interns share their experience with external parties (which can have a positive impact on the organization's reputation) and become clients themselves in the future (also a long-term perspective) (second quote from interviewee A). Employee engagement initiatives also include initiatives aimed at fostering the sense of belonging and “we-ness” at the ION. On this point, Interviewee A points out the role of celebration:

> “Sometimes we forget that we have to celebrate the innovations that are happening, and so [take] those moments, right? Everyone is waiting for these big breakthrough milestone celebrations and the teams themselves will celebrate, they will have release parties and do all sorts of things within their teams. But where the [subsidiary] comes into play is to build a spotlight like those, to build pride in the locations so people feel: “Wow, you know, this is a big… I´m part of something bigger”, whether it is the location or the larger purpose of [organization´s name]. It is super important. And so you´ll see us do lots of very meaningful events that are small and easy to do but that spotlight the teams and all their successes and their spectacular failures. It´s

> important that we [are][48] also able to create a culture where people feel comfortable in teams to be able to talk about what we experimented, (and to say) "this didn´t work out". Failure is a big part of learning, I like to say it is experimentation. And we do that!" (Interviewee A)

> "We will bring the locations together to recognize your years of service, so "thank you [researcher´s name as example] for your 5 years of service" (Only one example). I will have colleagues that are purposefully planted in the presentation to surprise you and there´ll be a colleague that will tell a great story: "I remember [researcher´s name as example] when she first started". It's very important, the role of celebrating. And then what we´ll see is the transition of that event into key milestones: Innovations, teams that went the extra mile, individuals that did something that was above and beyond. So, we put a spotlight on the team, we let them talk about why they feel it was a win and what the learning was, and we feel that that´s very important because other teams learn from those experiences and a built-in overall pride and it's part of healthy culture." (Interviewee A)

Celebration is described as a tool to foster a sense of "we" or, in the words of interviewee A, to foster a sense of belonging to something bigger, which can be the subsidiary (belonging to the entity), or the purpose pursued by the organizational entity. In both quotes, interviewee A points to the role of pride (in belonging to the organization). In the second quote, the influence on learning is also highlighted. In the first quote, the role of the organization as an entity in creating the conditions for developing a sense of belonging is highlighted, as each location needs to create the spotlight. Another initiative to foster the sense of belonging is to recognize and value the contribution of employees to the organization, especially the appreciation tool mentioned below:

> "We have this tool called [organization´s name] appreciation where you can appreciate a colleague in your organization, and sometimes the person is appreciated and that´s very good, his or her manager [gets][49] to know, but in [name of a location] what they did, which I found very unique, they got these people who had the maximum number of appreciations, because naturally for somebody who gets so many appreciations they are obviously doing something really good, bringing them together in an informal chat with the

[48] [take] replaced "taking", [are] replaced "be"

[49] [gets] replaced comes.

> MDs and this is something that now we are concretely following in [location].” (Interviewee F)

> “I took it back to [location] and basically we rolled it out in every one of our [subsidiaries]. So we chose to do it all across the country and what was that…We pulled a list of the people at [location] that had received the most appreciation and acknowledgement for hard work by their colleagues, and then we sent them a personal note that was from an executive saying: “We see that you have been appreciated by your colleagues. We love that you´re doing such a great work. Thank you, and we´d love to spend a half an hour to have coffee together”. And then we booked a session where at the end of it there was over a hundred employees in [location] that all had a one-to-one with an executive in [location]. And what was beautiful about that of course is that the employees I think loved the experience but the executives also. All took the part themselves to write a little brief: “I met [researcher´s name as example], she is so lovely, she does this” And so it was really good. I think everybody appreciated the effort. (That is) a small example, but that created a lot of great engagement and learning as we started to meet new colleagues.” (Interviewee A)

This appreciation tool relates to the relationships between employees (micro level: employee - employee relationship). In a nutshell, colleagues can appreciate other colleagues. Although in its practical form this tool refers to micro-level relations, it also affects micro-meso level relations. In fact, it is the organization (meso) that recognizes the employees who receive a high number of appreciations. In this way, these initiatives to promote appreciation at the micro level (employee-employee) are nevertheless a tool to strengthen the micro-meso relation. In the quote by interviewee F, it was highlighted that this appreciation tool led to the possibility of having a meeting with a manager (a recognition from the organization, also at meso level). As highlighted, someone who receives a lot of appreciation from other colleagues is *doing something really good* (for the organization). Interviewee A's quote also points to how appreciation from other colleagues (micro-micro) is then recognized by the meso level (personal note from management, coffee with management). Interviewee A's quote highlights how such initiatives actually promote engagement and learning.

4.1.3 Synthesis: Stakeholders´ Resources and Engagement at the ION

Table 8 summarizes the stakeholders prioritized by ION, the resources they contributed and the initiatives to foster their engagement according to the interviews.

Stakeholder	Resources brought	Initiatives to foster engagement
Start-ups	Know-how, innovative ideas, innovative ideas, agility, flexibility	Incubators, events, cooperation
Customers	Payment, ideas and experiences	Customer engagement centers, workshops, events
Government	Public services and reputation	Formal cooperation
Academia	Talents, visibility, access to incubators and start-ups, network opportunities	Formal partnerships, participation in academic events, speeches at universities
Local Partners	Know-how	Cooperation agreements
Chamber of Trade & Commerce	Knowledge and competencies, network opportunities	Registration in local chamber of trade and commerce, sitting on committees and advisory boards
Community	Societal demands	Corporate social responsibility, cooperation with specific communities (for instance, sporting communities)
Employees	Skills, know-how, competences	Initiatives aimed at creating a sense of belonging, for instance, celebration and appreciation tool

Table 8: ION´s Stakeholders Prioritization. Source: Own elaboration.

The table only includes the stakeholders specifically mentioned by the interviewees. It does not claim that interviewees have provided a comprehensive description of the ION's nexus of stakeholders. Key stakeholders, such as investors, were not the focus of their responses. Interviewee D briefly mentioned how his subsidiary matches local start-ups with "our venture capital". Nevertheless, the stakeholders mentioned by the MDs of the various ION subsidiaries suggest that cited stakeholders (perhaps along with others) are involved in the nexus and are a higher priority at the ION.

The connection between different stakeholders (nexus, not just a bilateral connection) and the impact of engagement with different stakeholders on learning provides evidence for organizational learning as learning through the extended knowledge system.

4.2 The ION´s Governance Structure

The second sub-question that guided the interview analysis was “what is the governance structure of the ION?”. The relevance of this question is related to the theoretical assumption that the organization, as a separate entity, represents a governance structure for conducting transactions.

The interviews allow for a better understanding of the workable arrangements of the ION. In particular, the ION governance structure is based on two main pillars (Figure 21). On the one hand, the ION provides global guidelines to all subsidiaries in the form of organizational values and strategies; on the other hand, the various subsidiaries have the autonomy to implement these values and strategies at local level.

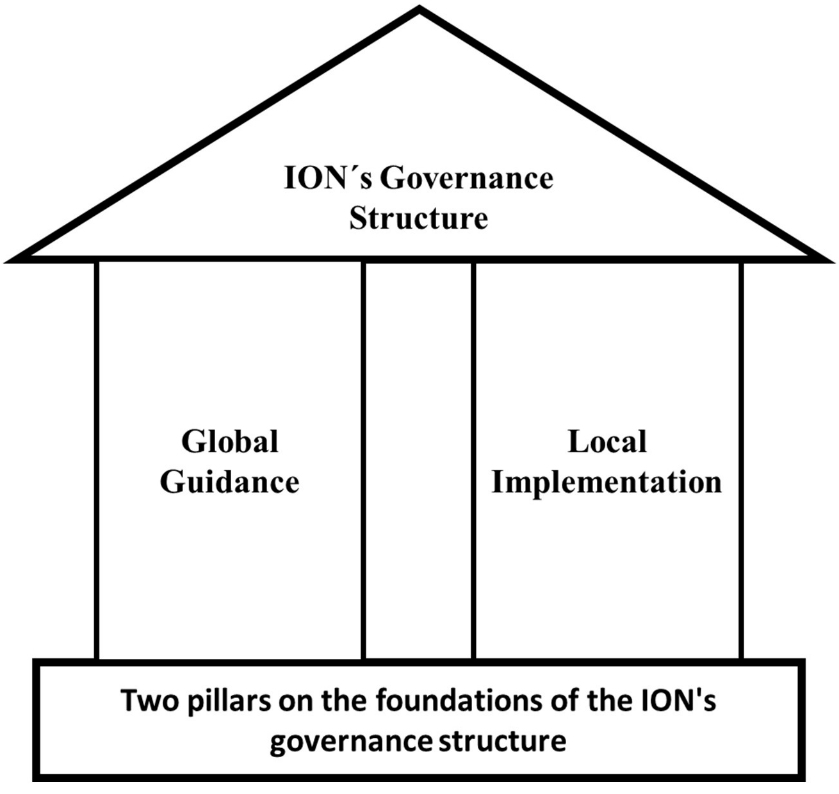

Figure 21: Pillars of the ION´s Governance Structure. Source: Own illustration.

Following Walzer (1994), the ION's governance structure makes clear the distinction between thin and abstract global values and strategies and thick local implementation. Global values and strategies are the main frame of reference guiding local implementations, as indicated by the interviewees (see below).

> "There are lots of things where things that are discussed globally can be brought back to a specific country or even region I would say." (Interviewee F)

> "We´ve created an executive leadership team (ELT) (…). Sometimes those goals (of the ELT) may be very specific for the locations that localize[50], which was your question earlier, but also they always tie back to the overall strategy and (the ION's) KPIs, always!" (Interviewee A)

> "But when it comes to local execution you need a clear direction." (Interviewee B)

> "We have hundreds of people who develop the so-called globalization, they localize [organization´s name] global products to the local legal requirements, first of all in payroll and then in finance, accounting and so on." (Interviewee D)

On the one hand, interviewees emphasize the existence of a "red thread" and clear guidelines for all subsidiaries, and on the other hand, the importance of taking local specifications into account. COVID-19 was cited by respondent D as an example of how the interplay between global guidelines and local interpretation works:

> "Now in these COVID-19 times for sure COVID 19 is the topic for everybody in every weekly call. On the one hand, there is global guidance and [organization´s name] global pandemic taskforce. These are the guys at the headquarters who monitor the trends and the number of people in the countries worldwide going up, going down and they provide [reporting][51] data and global guidance on whether we open offices or close offices. This is the global part. Then every country has legislation. In [country] there is a labour law which says the employer is obliged to provide workspace, physical rooms and infrastructure to every employee and the implication is, even if we say, now in [country], there is a lockdown, the office is closed

[50] Intended as "for the location that implement the global strategy"

[51] [reporting] replaced "report".

> because we take care of our people, we have to follow some local rules and figure out on the local level what are the legal implications, like if someone has to leave the company, they can go to court and say: "They fired me because of bad performance and so on but they have not fulfilled their obligations, for three months they did not allow me to enter in the office. I could not do my job and now they say I had not a good performance". This kind of stuff is very local, so the people in [headquarters] they have no chance to know each law of these 20 countries." (Interviewee D)

The quote from interviewee D emphasizes the role of the headquarters. During COVID-19, the headquarters monitors global trends and publishes reports on the situation in the different countries. Nevertheless, the actual application occurs at local level (decentralized). The headquarters provides a central support and coordination team. The ION´s meetings, which occur bi-weekly (interviewee A, B and E), are coordinated by a team in the headquarters. This central support and coordination team also undertakes a brokerage function (Retna & Tee 2010; Heikkila & Gurlak 2013; Kislov 2014; Zaheer & Bell 2005; Wenger et al. 2015). Indeed, when talking about who to contact in case of challenges to be overcome, after stating that at first, he/she would try to solve within its subsidiaries and the market unit, interviewee D stated:

> "And provided we cannot solve the issue or challenge in the [subsidiary] and the market unit is not able to help, my third station would be first contact [names], the operations team (ION´s management) and ask them for help and advice. Usually they would say: "Ahh, three weeks ago this [subsidiary] had a similar topic, talk to him or her" and then it is really social networking." (Interviewee D)

While in the literature the intermediary function in inter-organizational networks is assigned to individuals or hub firms, the findings show that in intra-organizational networks the intermediary function can be performed by a collective actor, such as a department or a team. In the ION, the centralized support and coordination team facilitates the connections between subsidiaries, coordinates the network and provides support when needed.

4.3 Transcultural Learning Model in Practice

ION´s nexus of stakeholders and governance structure provides the backbone for relational learning in organizations. However, it was elaborated that the actual learning takes place within an organizational learning process. An adapted model of transcultural learning that integrates the concept of CoPs was elaborated and presented as a model for operationalizing organizational learning as conceptualized in this research.

Against this background, a third question guided the interview analysis: "Does the transcultural learning model take place at the ION? and how?". To answer the question, it would be necessary to see if the steps of the model (contact, identification of commonalities, development of commonalities and relationalization of rationalities) find application at ION and, if so, how. Although the ION's MDs offer an intra-organizational perspective (the ION consists of subsidiaries of the same organization), heterogeneity in terms of dimension, foci, expectations, resources, culture, among others, offers insights into generalizing the findings to the nexus of stakeholders.

4.3.1 First Step: Contact at the ION

As for the first step (contact between heterogenous stakeholders), at the ION the different subsidiaries (organizational entities) are put in relation (meso-meso level). As a globally extended and decentralized organization, the ION requires coordination between its dispersed parts. After decentralizing, the organization had to reconnect its parts to reassemble the whole organizational entity. In this case, the organizational entity is the expression of the relation between its units. Thus, the ION represents the locus of contact between the different subsidiaries. It is here that the organizational units are recomposed into a general entity, which in Whitehead's sense is the "big formation":

> "Basically, [the ION] has as objective to bring the [subsidiaries] together, to let the [subsidiaries] work together, to create one [organization] even if we are different in different countries. Also, the sharing of best practices is very important. Different [subsidiaries] have different areas of business because we are diverse, but we can learn together and that´s our objective." (Interviewee B)

> "The [ION] is the super powerful engine to be able to bring very special topics that are maybe location-diagnostic[52] to the table so that we can, you know, hear what is coming, understand more deeply what has already been launched and

[52] Meaning topics that may regard the subsidiary, and not the whole organization.

have input into very specific initiatives from a global perspective. It is a powerful opportunity." (Interviewee A).

"The network itself is really how we can come together, share, understand where some of challenges are and how we can come together (..)" (Interviewee F)

These quotes show how diverse the subsidiaries are. They operate in different geographical and socio-cultural regions. They are active in different business areas. Despite their differences, at the ION they can *come together* (quote from interviewee F) and *learn together* (quote interviewee B). It is described as a *powerful engine,* for hearing, understanding (quote interviewee A), sharing (interviewee A and F), working together and creating one organization even if its single subsidiaries are different (interviewee A).

4.3.2 Non-Normativity and Pro-Sociality at the ION

The subsidiaries (meso level) are represented at the ION by their managing directors (micro level). Different managing directors bring multiple cultural events. For conducting transactions at the ION level (meso level), these different cultural events should be relationalized. Chapter five explained the role of contact in relationalizing polyvalent events. Non-normativity and pro-sociality are crucial concepts for successful contact for the relationalization of rationalities (see chapter five). Regarding non-normativity, analysis of the interviews revealed a certain degree of non-normativity or at least an organizational commitment to promote non-normativity:

"All we need is to [make][53] our colleagues aware that there are differences, there are different understandings, different work styles." (Interviewee B)

"Researcher: And why is diversity so important for the [ION] and for each [subsidiary] as well?

Interviewee C: Yeah, I mean, you know, it´s mainly… We have to understand each other, you know, so this is the most important thing. So, people from… you might be from a certain region, speaking a certain language, having a certain belief. In order to understand you and foster a very collaborative environment, you know, I have to be open, I have to be respecting the diversity

[53] [make] replaced bring.

> that you bring into the organization, right? Similarly, from your side also it is required to understand, I mean, it is not only about making big things all the time, but also understanding small things and, you know, this is very important. And then, when we are able to understand people and the diverse frames that they bring, it is much easier, and we would be able to leverage the maximum of the skills and capabilities that each one of us bring to the table. If you don´t foster that, we will be close, we will be in our own silos, there we think that the way we think is the way that has to be and then we lose an opportunity to connect and really take the best of all of us, right? [Interviewee C]

At the micro level, contact between the subsidiaries runs through the managing directors. The managing directors are involved in pro-social interactions. The activation of pro-social interactions between the different managing directors at the ION depends on the topic to be discussed. When asked who among the other managing directors they are in contact and interact with, it was unanimously stated in the interviews that it depends on the topic to be discussed:

> "It depends on the topic." (Interviewee F)

> "It really depends on the topic." (Interviewee A)

> "Researcher: And with whom especially do you speak? Interviewee B: It depends on the reason." (Interviewee B)

The analysis of the interviews made it possible to identify the main reasons for contacting and engaging in pro-social interactions with specific managing directors at the ION. The interaction can concern both the meso level (subsidiary - subsidiary) and the micro level (managing director - managing director). Both levels are distinguished in Table 9.

From the table it can be seen that subsidiaries (meso level) and managing directors (micro level) interact when they have something to share (a common domain to use the terminology of CoPs or initial commonalities to use the vernacular of transcultural learning). This result supports the argument that pro-sociality requires common ground to enable contact even in the organizational setting. Actors do not engage in contact for its own sake, but because of shared intentionality (Tomasello 2019).

Motivation of pro-social interactions	Description
Meso Level	
Conceptual similarities	Subsidiaries that have similar business foci connect between themselves.
Structural similarities	Connection between subsidiaries with similar structures and that therefore face similar challenges.
Expertise of single subsidiaries	Different subsidiaries have different foci and therefore expertise. When specific topics must be dealt with, the network enables the connection between the expert subsidiary and the subsidiary that requires expertise.
Micro Level	
Personal relationships	MDs that are personally connected (worked on projects together, worked at the same location, etc.).
Expertise of single MDs	Single MDs have individual expertise. Beside the institutional connection among subsidiaries, there is a connection also among MDs.

Table 9: Pro-Social Interactions at the ION. Source: Own table.

In the following, quotes that support each of the motivation of pro-social interactions are presented.

Conceptual Similarities

> "Among 20 [subsidiaries] we have different flavours (…) [Subsidiary in location x] and [subsidiary of the interviewee D], we are partner subsidiaries because we do have more or less the same goal, we both are market-focused subsidiaries. This means that our main objective, compared to other subsidiaries in the family, is first of all to support the business growth of the market unit, so the customer, the revenue growth." (Interviewee D)

Structural Similarities

When asked who he/she is in contact with and interacts with frequently, interviewee E named the subsidiaries in a specific geographical region and justified this as follows:

> "Why this area? We are closer geographically, so it is easy to travel between our cities and we have also similar sizes and similar issues in each of those [subsidiaries], so each of these [subsidiaries] has less than one thousand employees, for example, so there are different issues, different things work

> there than, for example, in [headquarters] where there are 20,000 people." (Interviewee E)

Personal Relationships

> "As a big family you are not equally connected to each of your relatives, so to speak, and the MDs who are maybe friends, colleagues, or have worked in another department in [organization´s name] previous life and have more trust to each other, have had more physical meetings in the past, so they also do have, let´s say, parallel communication channels where for particular issues." (Interviewee D)

Expertise of Single Subsidiaries and MDs

> "Usually with the [subsidiary] MDs it is more really about "I have a problem", either I know which subsidiary´s MD can help me directly because this topic is handled in the [subsidiary]. Like if I have start up or security issues I can go to [name], they do good things in [location]. In terms of event management, marketing, employee experience, for me the best advisor is the (MD) in [location], so the previous MD [name] and now [name], she was COO, [name] is a trusted advisor if it is really about the soft part, culture." (Interviewee D)

The quote by interviewee D refers to the expertise of individual subsidiaries as well as individual managing directors. Although interviewee D mentions the names of managing directors, i.e., individuals, he/she also refers to the expertise of subsidiaries. For example, the first part of the quote mentions the topics dealt with by subsidiaries (and not by individual persons). Even though the interviewee refers to the topics of start-up and security, it is emphasized that the location (not only the MD) does a good job in this regard. The second part of the quote mentions specific names, explicitly referring to the expertise of individuals, not necessarily that of the organization.

4.3.3 Second and Third Step: Shared Values and Strategies as Existing and New Commonalities at the ION

The concept of commonalities is crucial for transcultural learning. In the ION, organizational values and strategies represent a commonality between all subsidiaries. The results show that at the ION, despite the heterogeneity of the different subsidiaries and MDs, there is a clear focus on shared values and joint efforts to achieve organizational goals. Shared organizational values and common organizational goals provide a guideline for the different subsidiaries. They provide guidelines because they provide a common direction while leaving room for interpretation to better adapt to local specificities. The identification and creation of existing and new commonalities is linked to a strong value management process. Following Wieland's (2020a) classification of values, the ION's common values are divided into four categories: Performance values, communication values, cooperation values and moral values.

4.3.3.1 Performance Values

The performance values at the ION are linked to common KPIs (which are explained in detail under 3.4 in this chapter). The performance values at the ION can be divided into three main categories: Values related to a good workspace, to innovation and customer-oriented values.

Best workplace

> "We are also measured by being the best employer in the country, for instance, it is a very important KPI, but we are not obsessed by this KPI, by the number, if we are number one or number two, but this is our culture and mindset, we should create the culture and comfort to attract talents but also to retain talents and not only because of monetary benefits but also as the place where the people can evolve, where they can work for a long time, where they feel comfortable, safe." (Interviewee D)

> "We want to have the best people working for [organization name] across all locations, we want to maintain that standard of quality of the talents that we bring into [Organization´s name] and, as an ION, that also becomes a goal in terms of attracting and retaining the best talents in the industry." (Interviewee F)

> "Like just yesterday, which is just fresh in my memory, we had an ION meeting where we had the head of tech talent acquisition coming into the meeting and talking about what is the renewed strategy when it comes to talents, hiring in the [sector]. And, again, you can imagine [sector] hiring is happening across

all [the ION], we are all keen on understanding what strategy, what [are] some of the plans, what [are] some of the tools, what [are] some of the timelines, what [are][54] some of the best practices that they recommend to us." (Interviewee F)

All quotes emphasize "we", intended as the ION. Being the best place to work is not the impulse of a single subsidiary, but is collectively pursued by the ION. The fact that being the best place to work is a KPI and that every subsidiary is measured on its ability to retain talent shows its strategic dimension to the ION's performance. Being the best place to work is indeed a performance metric as it impacts organizational performance. The quote by interviewee D does indeed talk about monetary benefits (although the interviewee does not reduce benefits to financial benefits). The second quote by interviewee F allows the strategic relevance of talent acquisition to be understood as it is a topic of the renewed strategy session where tools, timelines and best practices related to talent acquisition are discussed.

Innovation

The topic of innovation came up again and again in the interviews. In the interview transcripts, the word innovation occurs one hundred and three times. It is a theme that was discussed and focused on by all interviewees. To synthesize, one quote has been selected that could reflect innovation at the ION:

"There´s a notion of innovation, so heart that all of us have KPIs that are around innovation, it´s the DNA of why we exist." (Interviewee A)

The interviewee talks about "all of us" and innovation is defined as the ION´s DNA. This serves to highlight the relevance of the value innovation to the ION.

Customer-oriented

Customers were also a relatively frequently discussed topic in the interviews. The word occurs fifty-one times in the transcript. In this case, too, one quote has been selected for the sake of conciseness:

[54] [are] replaced is.

> "We are more customer-oriented to have really a kind of connection to the customers. This is a common point." (Interviewee B)

Also regarding customer orientation, the quote by interviewee B emphasizes the "we" and the fact that this is a common point for all subsidiaries.

4.3.3.2 Communication Values

The quotes below regarding communication values underline that, despite different points of view, respect and understanding are at the roots of communication at the ION:

> "And that is something to be said, this diversity brings different points of view on different things, so we, as to speak, the group part of the [ION], we always treat each other with respect and understanding and we really learn from each other and that´s a kind of open mind. And this diversity then brings new angles, new ideas." (Interviewee E)

> "I think that the basic thing is that a [subsidiary] director to act in a very diverse space is respect. That is the fundamental thing. We have to be respectful, we have to respect other cultures, we have to respect diversity, then there is a cascading impact." (Interviewee C)

Open communication, transparency, open-mindedness, willingness to listen were also mentioned by interviewee E. Transparency was also mentioned by interviewee C. Interviewee A also pointed out:

> "What is very important is that, in this biweekly (meeting), you can show up and talk very openly and freely." (Interviewee A)

The same is confirmed by interviewee F:

> "It is not like: "Oh I am the best and I keep everything to myself", that´s definitively not the atmosphere I have been experiencing." (Interviewee F)

4.3.3.3 Cooperation Values

From the interviews it emerged that the cooperation values at the ION are reciprocity, trust, consensus and continuity, as supported by the quotes below.

Reciprocity

Interviewee D reports an example of reciprocity. His/her subsidiary wanted to increase cooperation with sports clubs but did not have the necessary expertise in this area. The manager contacted another subsidiary that had competences in this area and received help:

> “This is an example [of] [55] how we help each other (the example of sport clubs). Next time they will come to me with a topic, just have another request: “Oh, we have some great start ups in [location] for industry 4.0, we would like to connect with top [location] customers, because we know that they are now renewing their IT infrastructure and we want to present them something very modern and can you help us?” (Interviewee D)

The last sentence underlines reciprocity. They received support to establish cooperation with sports clubs, but in the future (next time) the subsidiary that provided assistance may need support in other matters (in the case of the example, to gain access to the clients of the subsidiary managed by interviewee D).

Trust

It is deduced from interviewee F that trust is defined as a pre-requisite for success, a key requirement for teamwork and cooperation at the ION:

> “I think for us to be successful we have to be very open, we have to be very collaborative, we have to trust each other as leaders and also benefit from each other’s learning or mistakes, or “Hey, I have already tried this, it didn´t work, maybe you want to take this as a learning.” And I think that is the key essence in terms of values that again translate into collaboration, team-work; trust becomes also very important for the success of the network.” (Interviewee F)

Consensus & Continuity

In the course of the interviews, it becomes clear that exchanges within the ION continue over time. In the previous quotes, the frequency of the exchange was reported (fortnightly). The long-term engagement with different

[55] [of] replaced on.

stakeholders (see the part dedicated to stakeholders´ prioritization) also underlines the long-term focus of the ION and thus emphasizes continuity.

As for consensus, although different strategies and values are adapted to the local context (see discussion on governance structure at the ION), the fact that different stakeholders confirmed the same values and strategies and highlighted their relevance to the ION could be a sign of consensus at the ION, at least at top management level.

4.3.3.4 Moral Values

From the interviews it emerged that the moral values at the ION are people as first priority, diversity and inclusion, social responsibility and integrity, as evidenced by the quotes below.

People as First Priority

The following passage from the interview with interviewee B exemplifies the value "people as first priority":

> "Researcher: And are you able to identify one or more common points in terms of values among all MDs?
>
> Interviewee B: Many I think. For example, we take care of people because people are our most valuable asset. Just to give you an example in the Covid-19 (…) the first priority was the safety of employees (…). So we really make people our first priority."
>
> (…)
>
> Researcher: And do you think that, for example, the value "People are the first priority" has the same meaning for all MDs?
>
> Interviewee B: People are different, right? If I say that all have the same meaning maybe it´s not true, but we see most MDs take these very seriously, because we could feel, especially for the Covid-19 response, we could feel MDs really put people in the first place, in the first priority. Regarding the degree, maybe one MDs put this as top priority, maybe another one considers also another aspect. That could happen, but I would say most MDs, all MDs I think, they put people as first priority." (Interviewee B)

When asked about the common values for all MDs, interviewee B began his answer by emphasizing the value “people as first priority”. To support the validity of his assertion, the example of COVID was given. Interviewee B acknowledges that the importance of this value may vary and that different MDs attach different importance to this value, but he/she still believes that this is a common value.

The KPI on employee engagement discussed earlier reinforces this value. To assert that people are the first priority has an impact on the organization's reputation and, as seen in the discussion on the KPI on employee engagement, also has financial implications. Therefore, the political dimension of such a response should not be neglected.

Diversity & Inclusion

> “Researcher: I would like to start by asking you how you would describe [the ION]?
>
> Interviewee A: So the [ION], first we have to look at its history, so it is a construct that is 10 years old, it is a true representation of what diversity means at [organization´s name]. I think that if you look, over the fact that we have over 20 [subsidiaries] and over 17 countries represented. One of my favourite things is to see the [ION] coming together, whether we do that virtually or in person, we really see the power of what is possible when bound together so many different countries and all these different perspectives, some of the [subsidiaries] are larger than others and so the learning and exchange that happens and the way that we all have an opportunity to be better in what we do is there because of the [ION].” (Interviewee A)

In another passage, interviewee A added:

> “In everything we do in creating an environment that celebrates diversity, that spotlights diversity and that creates an inclusive environment is something that you see manifested and all the different types of activities that we do. So that´s very much tighten to the values of [organization´s name], the [ION] as an expression of that.” (Interviewee A)

The interview passage underlines the importance of diversity for the ION. ION is defined as a true representation of diversity. In the second quote, diversity and inclusion are linked to the values of the organization as they are expressions of the ION. This view is confirmed by interviewee C:

> "This is what the [ION] does, we foster diversity and inclusion and then we connect all these different cultures into [one][56] platform. Whereby we fully leverage the strength of all the different origins and people." (Interviewee C)

Interviewee B points out that diversity and inclusion are among the topics discussed at the ION meeting. It was also highlighted that the dimensions of diversity may have different meaning and importance in different subsidiaries, and therefore measures to promote inclusion may be different in each subsidiary. Interviewees highlighted the different dimensions of diversity. The following examples were given: Gender, generation, persons with disabilities, national diversity. Regardless of the diversity dimension, the importance of the following aspects was highlighted:

> "Making sure that we create this environment where there is cultural diversity that is celebrated, that there´s an inclusiveness about how we operate our [subsidiary], so that everyone can be represented and can be their best self." (Interviewee A)

Diversity and inclusion were associated with innovation. Interview partner B indeed points out:

> "We believe in inclusion and diversity and this is the source of innovation." (Interviewee B)

The importance of diversity for the ION is also related to the ION´s external environment. The organization operates in a highly technological and dynamic environment that requires innovation. Nevertheless, according to interviewee D, this diversity may have also some pitfalls, as it can increase the time needed for decision-making:

> "The less diversity you have, the faster you bring results. If you are [on a][57] ship or in the army you really have to get things done and be very quick and make tough decisions and execute, it is one topic, but it is not really the topic for [the ION]. Our goals and objectives are to create best [product], to establish

[56] [one] replaced "a same".

[57] [on a] replaced "in the".

> great ideas, create teams and produce this stuff and for these tasks, the more diversity you have, the more successful you are." (Interviewee D)

Interviewee C emphasizes that it is important to bring heterogeneous actors into contact and to foster learning to foster diversity:

> "If you want to have diversity fostered, it is very important that people learn from each other and that they understand what capabilities or strengths that each person bring on to the game." (Interviewee C)

Interviewee C also provides some concrete examples of how diversity and inclusion are implemented at the ION, such as the cultural ambassador network. Interviewee C also underlines the importance of supporting the value "diversity" with concrete actions:

> "Speech itself is not enough but it has to be substantiated with actions as well. If you believe in diversity, you have to [do][58] those actions which support diversity. I can now speak hundred times about transparency, but if I do not define myself as a transparent person… It is reflected very easily, it is only lip service and then there´s nothing more about that, so then people will automatically come to a decision that this is all marketing speech or fake speech, you know? That is very…, you have to substantiate your speech with actions supporting diversity." (Interviewee C)

Also in this case, the political dimension of the statements should not be neglected. Nevertheless, in a study conducted in one of the ION's subsidiaries, which included interviews with local employees, it was highlighted that diversity is also perceived by employees (reference not disclosed to ensure ION's confidentiality), which strengthens the reliability of the responses.

Other Moral Values

Other moral values mentioned in the interviews are social responsibility (mentioned by interviewee A) and integrity (mentioned by interviewee A).

[58] [do] replaced "make".

4.3.3.5 Shared Values: A Synthesis

Table 10 summarizes the common values at the ION and groups them into four categories (Wieland 2020a).

Performance Values	**Communication Values**
Best workplace & eagerness to attract talents, innovation, customers oriented	Respect, understanding, open communication, transparency, open-mindedness, willingness to listen
Reciprocity, trust, consensus, continuity	People as first priority, diversity & inclusion, social responsibility, integrity
Cooperation Values	**Moral Values**

Table 10: Shared Values at ION. Source: Own table.

The analysis of the shared values highlighted that while describing the values, the interviewees used the subject "we". Values as a shared domain foster the sense of "we-ness" at the ION and pattern formation, which are then stabilized at the ION (structure formation). As "we", members of the ION form a mini-society. Shared values guide the strategy. Their interpretation and local applications are not described as universal, but as a result of mutual process. Thin values defined at a corporate level become thick in local contexts.

> "We cannot just take over, we need to realize what is the main highlight, the main clue point, the main key element of this program and then we adopt." (Interviewee B)

> "So our goal is to be able to break down and translate the overall company strategy and to be able to translate that into every line of business that [exists][59] in the [organization] and to be able to translate it to every [employee] and give

[59] [exists] replaced "is existing".

them also everything that they need to be able to deliver on those goals." (Interviewee F)

"Every globality has a local footprint." (Interviewee E)

At a thick level, the differences of contexts, decision logics and language games are taken into account. Thin values find application in local thick practices. Practices developed in the learning process, although shared, are adapted to different contexts.

4.3.4 Drawing the Transcultural Learning Model at the ION

Against the background of the discussion so far, Figure 22 shows the model of transcultural learning at the ION.

Contact Between Heterogenous Stakeholders	**Identification of Existing Commonalities**	**Development of New Commonalities**	**Relationalization of Rationalities**
Stakeholders´ Interests & Resources Different Rationalities Non-Normativity & Pro-Sociality	Shared Interests in the Transaction Initial Shared Domain	Shared Practices for Pursuing Transaction Sense of "We-ness" Recategorization/ New Cultural Situation / Mini-Society Pattern Formation	Transcendental Relation Mutual Transformation Structure Formation
Subsidiaries Get in Contact at ION	Shared Organizational Values, KPIs & Strategy	✓ Org. Best Practices ✓ ION as "We" ✓ ION as Mini-Society	✓ Subsidiaries/MDs and ION change in the process ✓ Learning for both MDs /Subsidiaries and ION ✓ ION as Structure

ION as CoPs (Locus of Contact & Learning)

Figure 22: Transcultural Learning Model at the ION. Source: Own illustration.

As for the first step, the subsidiaries get in contact at the ION. Chapter six argued for CoPs as loci of contact for organizational learning. According to

Wenger et al. (2002), a community of practice has some fundamental elements necessary to define a group of actors as a CoP, namely domain, community and practice. In the ION, the common domain is represented by shared organizational values, KPIs and strategies. The MDs form a community to develop and share practices to put the overall organizational strategy into practice while carrying out organizational transactions. In particular, the shared interests of the different subsidiaries represent an initial commonality. This initial commonality fosters contact and pro-social interaction for developing shared practices.

While pursuing a common domain, the subsidiaries of the ION develop a sense of "we-ness". It is not about single subsidiaries or MDs, but the ION, the new joint agent. In this sense, drawing on Wieland (2020a), the subsidiaries represented by MDs form a mini-society at the ION. The interviews also indicate a mutual learning process. Both MDs and the ION subsidiaries are learning in the process.

The MDs learn from other MDs:

> "I have adopted some of the strategies from a few of my colleagues MDs. So, again, I just, you know, being sharpened, and learning from their experiences is super important." (Interviewee A)

Subsidiaries learn from other subsidiaries:

> "Some [subsidiaries] have an extensive knowledge in one topic and whenever there´s a need to use the technology or the solution in different [subsidiaries] we can use the knowledge from this [subsidiary] (…). So that way we can teach each other technologies, teach each other best practices about implementations." (Interviewee E)

> "When we learn some best practices from another [subsidiary] then we adopt that." (Interviewee B)

Although the effects of learning at the micro-level (MDs – MDs) is relevant and can affect the individual learning process (cognitive individual learning at a micro level), the learning at ION is aimed at fostering the organizational strategy and thereby the organizational transformation over time. It is a learning process that transcends its relata. It does not simply regard MDs/subsidiaries or the ION, but both. The process is depicted in Figure 23.

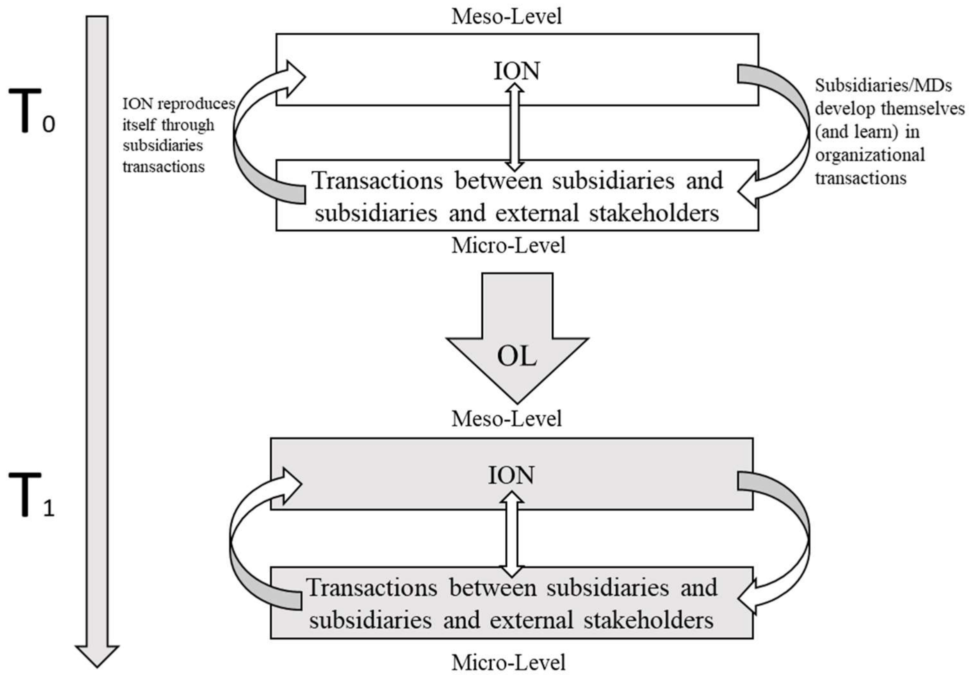

Figure 23: Learning as Micro-Meso Relation at the ION. Source: Own diagram.

Although the interviewees were MDs and therefore represented a management perspective, the importance of other stakeholders was also highlighted during the interviews (see point on stakeholder identification and prioritization). Organizational learning was defined in the context of this thesis as both an intra- and an inter-organizational phenomenon. Different rationalities are brought to transactions by stakeholders even across institutional boundaries, and these different rationalities must then be relationalized for the transactions to take place. The following quote gives an example of the stakeholder "customer":

> "We are building for a global marketplace. Our customers are differently abled, gender-diverse, culturally diverse and there´s an age diversity of course in the customers and how they consume our solutions. So, with that in mind you have to be building and thinking about how you build these solutions and the best way to do that is to have that diversity right at the table." (Interviewee A)

The findings demonstrate that the organization is aware of polycontextuality, polylinguality and polycontexturality. The ION is an organizational structure that enables the relationalization of multiple rationalities, both at meso level (different subsidiaries) and micro level (managing directors) and in this sense can be seen as a polycontextural management mechanism.

4.4 Learning Outcomes and Organizational Performance

"What is the impact of learning in the context of the ION on organizational performance?" is the last question that concluded the analysis of the interviews. This question is connected to the measurement of the impacts of organizational learning at the ION on organizational performance.

As a business organization, the ION is guided by the guiding difference earnings/costs. In chapter six, it has been argued that organizational relational learning would be successful if $CR_L - RC_L > 0$, e.g., when the cooperation rent generated by learning at ION would be higher than the relational costs that the ION pays for fulfilling its organizational purpose and maintaining MDs' and subsidiaries' willingness and ability to cooperate between one another and with stakeholders beyond the institutional boundaries. As far as the ION is concerned, although the interviews did not capture the relational costs associated with learning at the ION, the interviews did provide insights into the relational rent, i.e., the surplus that such a structure provides for the organization:

> "Let´s say that you bring 10 people together in one team the power is bigger compared to single individuals doing their job. The same here, you have 20 [subsidiaries], if you bring them together, the collaboration, the synergy effect is huge. That´s why we need an [ION]." (Interviewee B)

Interviewees describe the ION as a source of excellence and its impact on stakeholders´ and organizational success:

> "It´s hard to not place that in the highest regard when you see such a rich environment with colleagues showing up every Wednesday, every second Wednesday on this call with 17 countries is a beautiful powerful thing. And when you live it, you understand the power of what´s possible. I would say this is a high value for the excellence." (Interviewee A)

> "We all have to have this mode of constant learning (…) In that sense, each of those competences that I talked about (…) I think it is not we are the best, we come back, we learn, we have to constantly keep our, how we call it, you have to be on top of your game, which means, which translates into you coming

back, you do your homework, you talk to people, you share ideas, you learn from them and bring it back right? I think that´s a constant cycle which helps us to be successful, at least it helps me be successful in what I am doing or try to be successful in what I am doing.” (Interviewee F)

In terms of measuring the impact of the ION, the performance of the ION is measured by specific organizational KPIs (Key Performance Indicators). The following KPIs were highlighted in the interviews (table below).

KPI	Description	Measures
Innovation	To drive innovation	Events, incubator, tech-spaces, leverage talents
Growing relationships with the local eco-system	Academia, start-ups, community, partners, customers, chamber of trade & commerce, etc	keynote speeches at large events, connecting with local chamber of commerce, partnership with academia, sponsorship, connecting to local start-ups, community and partners
Driving employee engagement	To bring employees together, foster collaboration, innovate together	Best work place, formal and informal events, coffee corner; appreciation and acknowledgement for employees´ work

Table 11: Shared KPIs at the ION. Source: Own table.

As already discussed, the second and third KPIs (growing relationships with the local eco-system and employee engagement) are related to the organizational nexus of stakeholders. In this way, the organization's performance is measured in terms of its connection to its stakeholders. The employee engagement KPI relates to internal stakeholders. The KPI “growing relationships with the ecosystem” illustrates a broad understanding of stakeholder engagement.

The third KPI (innovation) also refers to the organization as a nexus of stakeholders:

“Thanks to a distributed eco-system we can gain advantages from local eco-systems, start-ups, universities, and in that way we can also improve innovation, in that way we can have some innovation specialized in specific areas and so others can specialize in different areas.” (Interviewee E)

These KPIs are shared by all subsidiaries at the ION. Apart from shared values and strategies, shared KPIs are also commonalities among MDs. Shared KPIs mean clear orientation on the one hand, and room for adaptation to different local contexts on the other:

> "This (shared KPIs) means that, on the one hand, there is clear guidance, and there is a clear structure [as to][60] what every [subsidiary] has to deliver back to the family." (Interviewee D)

> "We have KPIs that exist across the [ION]. What I love about this is that we have some opportunities to localize and interpret what will work best in our local market, so there is a red thread, if you will, in terms of the KPIs consistently, so we all have the same baseline to start from." (Interviewee A)

Further impacts on performance of the learning process at the ION regards the following aspects:

Higher performance teams:

> "We are able to create high-performing teams with the impact of the network." (Interviewee C)

Customer responsiveness:

> "So, if we perform as one single team it benefits our customer immensely." (Interviewee C)

Improvement of management and performance at a local level:

> "(The ION), it´s a construct that is there to support us in day-to-day, month-to-month, operations." (Interviewee A)

> "The whole point is really how can we share some of the things we are doing in a particular location with others, how can we cascade the strategy into the execution." (Interviewee F)

> "It is clearly easy to say that some ideas could be already be worked on in some locations even before we think about that. So, in this way, this collaboration can give us the information what works or not or I can at least

[60] [as to] has been added

ask the question whether somebody tried that and get the opinion if this is a good idea or not." (Interviewee E)

"We act as one single unit and the [ION], being able to foster all of these units, they are able to have a better solution for our plans in the region and globally." (Interviewee C)

5. *Discussion*

The aim of this chapter was to provide empirical evidence for organizational learning as a process for the relationalization of different rationalities. Methodological Relationism is the meta-construct underpinning this view of learning. This means that organizational learning is defined neither as learning of the elements that compose the organization (methodological individualism) nor as learning of the organization detached from its members and its resources (methodological holism). Relational learning involves a micro-meso-relationalization and a mutual transformation of the organization as an entity as well as its stakeholders and their resources. The focus shifts from individual parts to parts in relation.

The learning process at the ION was presented as an empirical example of such an organizational learning. Elaborating organizational learning as conceptualized here required a revision of the nature of the organization behind the definition of organizational learning. While traditional learning theories rely (sometimes implicitly) on the nature of the organization as a group of employees (see chapter three), relational learning refers to the organization as a nexus of stakeholders´ resources. The study at the ION allows such a nexus to be portrayed, thus providing empirical support for the concept of the organization as a nexus of stakeholders´ resources. In particular, the study enabled the identification of ION stakeholders, the resources they contribute and their prioritization for the ION.

Relational theory distinguishes between the stakeholders that form the organizational nexus of resources and the organization as a separate entity. This entity in itself provides the governance structure for conducting transactions. The ION as an entity also provides governance structure. The study also enables insights to be gained into the characteristics of this governance structure. In particular, it showed that the ION's governance structure is characterized by global guidance and local implementation.

The elaborations on the ION´s nexus of stakeholders´s resources and the ION as an entity in its own right providing a governance structure formed the background for the analysis of the relational learning process at the ION. The transcultural learning model integrated by the concept of CoPs has been applied for the operationalization of organizational learning. Therefore, to study whether and how relational learning takes place at the ION, it was necessary to investigate whether and how the steps of the model take place at the ION. Although the study aimed to obtain an overall view of how the different stakeholders are involved in the process, the fact that the interviewees were managing directors of some of the subsidiaries provided particular insights into how the learning process takes place at the ION, its subsidiaries and its managing directors.

The first step of the model is contact. The CoPs represent relational spaces, the loci of contact between heterogeneous stakeholders bring diverse resources and rationalities to organizational transactions. In the study presented, the ION represents the locus of contact between the different subsidiaries and their managers. The different subsidiaries are located in different geographical and socio-cultural contexts and therefore bring different rationalities. They have different expertise (resources). These different resources are important building blocks for the overall success of the ION. Non-normativity and pro-sociality are pre-requisites for successful contacts and cooperation (see chapter four). The study found a high level of pro-social interaction among MDs. Some evidence of non-normativity was also found.

The subsidiaries come into contact at the ION because they have common interests (common domain to use the vernacular of CoPs or existing commonalities to use the vernacular of the literature on transcultural learning). It emerged from the interviews that these initial commonalities in the ION relate to shared strategies, KPIs and organizational values. As part of the pro-social process at the ION, the managing directors of the subsidiaries discuss and develop practices to implement and optimize shared values, KPIs and strategies at the local level. These practices represent new commonalities that emerge from this process. Through pro-social interaction, the subsidiaries create and promote a sense of “we-ness”. The pronoun “we” was used extensively by the interviewees. This is not “I” or “they”, but “we”, which denotes a recategorization process. In this sense, the subsidiaries form a mini-society in terms of organizational transactions. Due to the long-term orientation of the relationship between the directors, this relationship can be defined as relational-based ties.

In an organizational context, identificating and developing commonalities would be a necessary but not sufficient step. Relational learning as defined in this work requires a transcendental relation, intended as mutual transformation of the organization and its stakeholders. At the ION, respondents address how they change and learn in the process, but also place emphasis on the organization as entity (organizational success, performance, etc.). This would be evidence of learning that leads to change at both the individual (cognitive process) and organizational level (organizational learning).

The motivation for investing in learning may be different in different types of organization. Different organizations have different guiding differences (see chapter one). As business organization, earnings-costs is the guiding difference of the ION. Business organizations will invest in relational learning if the learning either affects returns (by increasing factor and relational rent) or reduces relational costs associated with the relationship between subsidiaries, MDs and MDs/subsidiaries and external stakeholders. The results of the interviews provide insights in particular into the cooperation rents generated by learning at the ION. From the interviews it also emerged that the learning process at the ION fosters successful cooperation between the subsidiaries and between the subsidiaries and stakeholders beyond the institutional boundaries. All interviews confirmed the positive impact of the learning at the ION on the MDs as well as organizational performance as a result of the learning process at the ION.

Although the study focused on the ION (an intra-organizational construct), the role of external stakeholders for the ION´s transactions and the ION's efforts to engage with these stakeholders also emerged from the interviews. This may be evidence that organizational learning is both an intra- and inter-organizational phenomenon.

Practical implications for the relational learning model can also be derived from the study. In conceptualizing the model for operationalizing relational learning, the focus was on the locus of contact between stakeholders. The concept of CoPs was then used to define this locus in organizational contexts. The ION is a concrete example of such a place. In the context of the ION, representatives of subsiadiries (MDs) meet (sometimes virtually, other times in person). The ION thus provides an empirical example of how different actors (in this case subsidiaries) can be connected and how their interaction can be facilitated. The ION is a CoP in the sense that it has a clear domain (shared strategies, KPIs and values) and forms a community (consisting of MDs) to develop practices (to implement values and strategies).

From the study of the ION it emerged that, besides pro-sociality and non-normativity, reciprocity and open exchange processes are necessary for successful interaction and cooperation. It also shows that heterogeneous actors have different strengths. In the ION, the focus is not on the more prestigious actors in the network (to use the jargon of network theory), but the different actors complement each other. The positive approach towards diversity and the recognition of the validity of different values seems to be fundamental for successful transactions in the ION. Despite the diversity, the shared organizational values, KPIs strategies bind all subsidiaries together in the pursuit of organizational goals.

The distinction between “thin values” and “thick implementation” is also clear in the ION. Although there are common organizational strategies, KPIs and values (at a thin and abstract level), these commonalities are then applied in a thick local context.

The learning process at ION promotes openness to diversity on the one hand. On the other hand, it leaves "room" for local distinctiveness. In this sense, the learning process at ION would promote the “weakening” (in a positive sense - see chapter five) of the organizational culture.

In general, this research aimed to provide theoretical and practical contributions to organizational learning. The focus was on understanding how relational organizational learning can be conceptualized and put into practice.

6. Limitations and Future Studies

Although the study provides evidence that the organization is a nexus of stakeholders´ resources, of how different stakeholders are embedded in the organization and contribute to its success, and of the need to consider the rationalities of different stakeholders, since the respondents were MDs, the study enabled the capture of a managerial perspective. Organizational relational learning has been mainly analyzed in terms of the micro-meso relationalization with reference to the stakeholder “subsidiary/MDs” and the organization ION. Further studies should include both employees (to verify that the process does not only consider the management level) and external stakeholders (to validate the theoretical claim of relational learning as inter-organizational learning and to verify if the mutual transformation also affects external stakeholders).

The study involved only one organization. Although one organization was sufficient for the aim of this study (to verify whether relational learning can find empirical application), a multi-case study would allow the differences of relational learning in different organizations to be analyzed. The ION is a business organization. The model was elaborated with reference to different types of organizations (e.g., political parties and NGOs). Further studies could extend the study to other types of organizations.

A longitudinal study would also make it possible to draw a better picture of how relational learning and mutual change occur in the ION over time.

Conclusions

1. *Research Process and Summary of the Findings*

The aim of this dissertation project was to conceptualize organizational learning (OL) within the theoretical framework of relational economics. This goal was motivated by a research gap: In the relational economics research stream (Biggiero et al. 2022), organizational learning has not yet been discussed and conceptualized by scholars in the field. Against this background, a first and general research question was derived for the research at hand: How can organizational learning be conceptualized in the framework of the relational economics theory?

To conceptualize organizational learning within the framework of relational economics, the theory of relational economics and, in particular, its propositions about organization were first reviewed. Indeed, while relational economics theory did not address the issue of organizational learning, it does provide a conceptualization for the nature of organization. In particular, the first chapter elaborated on the nature of the organization as a nexus of resources and interests of stakeholders. Transaction is another key concept for the nature of the organization in relational economics. Stakeholders are stakeholders of the organization because they invest resources to carry out transactions. The organization then forms a governance structure for carrying out these transactions. Relational economics also emphasizes that different stakeholders who invest useful resources in the organization bring different rationalities and emphasizes the role of relationalizing rationalities. According to this view, an organization would continue to transact and thereby create value and exist if it would be able to relationalize these rationalities. Learning, understood as a phenomenon that enables the organization to evolve, create value and survive, therefore requires this relationalization process. Against this background, learning in this research has been conceptualized as the process of relationalizing different rationalities to carry out transactions. On the other hand, another key concept in the nature of organization in relational economics is the conceptualization of the organization as a distinct entity that exists beyond the resources of the stakeholders. Therefore, to refer to organizational learning, one would have to conceptualize learning as the learning of the entity in its own right beyond the learning of the individual stakeholders.

The concept of organization as an entity is associated with the noun "organization", which is opposed to the verb "to organize" in the literature. Although this research is based on organization as an entity (noun), it does not assume a static view of organization, as the entity (form) exists in its processes. In this way, a "both/and" approach was applied.

These initial elaborations on relational economics have provided the theoretical foundation for the conceptualization of organizational learning within the framework of relational economics. To proceed with the research, some sub-research questions were derived. The first sub-question related to the conceptual fit between the notion of organizational learning as proposed in the research at hand (relationalization of rationalities in the organizational entity) and the notion of organizational learning in existing literature. To examine this fit, a literature review was presented and discussed in chapter two. The literature review highlighted the existing debate in organizational learning literature between learning *in* the organization and learning *by* the organization. In particular, the elaborations that focused on learning in the organization were influenced by the literature on individual learning. Other elaborations, despite focusing on the organizational entity rather than the individual, conceptualized organizational learning as though the organization learns in the same way as the individual, which can lead to the danger of antropormophization.

This kind of conceptualization of organizational learning in existing literature can be related to the nature of the organization based on the studies on organizational learning. In particular, chapter three highlighted that the golden age of organizational learning literature coincided with a neoclassical view of organization. The latter called for a more humanistic view of the organization in contrast to the classical theory, which conceptualized the organization as a machine. In the shift from classical to neoclassical theories, the organization thus went from being a machine to a social system. To make a social system productive, the social and psychological factors of the employees that make up the organization are crucial in promoting value creation. Although the merits of neoclassical theory cannot be denied, its strong focus on the employees within the organization complicates the conceptual distinction between the organization and its employees and, in the organizational learning literature, the conceptual distinction between individual learning in the organization and learning by the organization. This research rather claims that, as a social phenomenon, the organization may not learn in the same way as the individual. The organization may not learn the same things as the individual. Modern organizational theories challenge the neoclassical view of the organization. The former conceptualizes the organization as a dynamic, open system. This allows a shift from a purely intra-organizational view, where the organization is conceptualized within its institutional boundaries, to a view where the organization is embedded in regio-global value networks. In the organizational learning literature, this shift has led to recent studies that focus on learning in networks. The present study aims to contribute to this modern stream in the literature on organizations and organizational learning.

It has been argued that these current conceptual shifts require a major conceptual change, namely a methodological change from individualism to relationism. This methodological shift and its implications for organizations and organizational learning were discussed in chapter four. Organizational learning in the meta-construct of relationism would allow organizational learning to be conceptualized as a micro-meso-relationalization process with a focus on transactions involving multiple relata that are not stable but mutually and constantly change each other. This methodological shift would be a step towards overcoming the organizational learning paradox highlighted by Popper & Lipshitz (1998), which states that while the organization is not the mere sum of its individuals, there is no organization without individuals. The conceptualization of organizational learning as a micro-meso-relational relation does not require the juxtaposition of organization and individuals. Conceptualization within the framework of relational economics does not require the neglect of the role of individuals (or stakeholders) – they are, after all, investors of resources - while recognizing the organization as a separate entity. As for the question raised by Popper & Lipshitz and already presented in chapter two, “Can organizational learning be treated as an extension of individual learning?” (Popper & Lipshitz 1998: 163), this study aims to contribute to answering the question with “no”. In particular, this research contributes to theoretically underpinning the second and third arguments presented by the cited scholars, namely that organizations are capable of learning, which means that the phenomenon of individual learning is distinct from organizational learning: Learning in the organization and learning by the organization are two different phenomena.

After elaborating the conceptual changes required to conceptualize organizational learning within the framework of relational economics, an attempt was made to operationalize organizational learning as a process of relationalizing rationalities. In chapter five, the model of transcultural learning was used as a model for this operationalization (in the context of the sub-research question b of how the TLM might contribute to the operationalization of organizational learning in terms of the present research). Following relational economics theory, culture was defined in this research as the different expectations and rationalities that parties investing resources attach to transactions. The process defined in previous elaborations on the transcultural learning model as a process of identifying and developing commonalities was defined here as a process that leads to the relationalization of different rationalities and the creation of a new common and distinctive agent "we" (the organization). Furthermore, by fostering the non-normativity and pro-sociality (key concepts in the steps of the TLM), the TLM contributes to the "weaknessing" the organizational culture in the positive sense of a culture that is open to the diversity of values. As discussed in the literature review, organizational culture can promote or hinder organizational learning. Therefore, besides the operationalization of learning as relationalization of rationalities, the steps of the TLM would foster an organizational culture open to heterogeneity and thereby promote further organizational learning.

In chapter six, the concept of CoPs as relational spaces and loci of organizational learning was introduced and discussed (sub-research question c related to the role of CoPs in TLM). A new version of the model of transcultural learning with CoPs as its basis was presented and discussed. CoPs became the basis because, when conceptualized as relational spaces, CoPs may regard the whole learning process rather than one single step. Furthermore, the steps of the model were adapted and a fourth step was added: Relationalizing Rationalities. While the first three steps relate to pattern formation, the fourth step relates to structure formation at the organizational level.

For the assessment of organizational learning, it was proposed to use the relational costs (RC) of performing the learning process and the cooperation rents (CR) generated by the learning process as variables. Organizational learning would be successful if the cooperative rents generated from learning are higher than the relational costs associated with implementing the learning. It was highlighted that it can be difficult to measure the variables, especially CR, as rents can have an intangible form in many cases. Nevertheless, some possible methods, such as storytelling and shared value statements presented in chapter six may be useful.

This research concludes with the presentation of an empirical case study conducted in an intra-organizational network of a global company (the ION). The aim was to provide empirical evidence for the application of the organizational learning model in a real organization. The case study at the ION empirically demonstrated the concept of the organization as a nexus of stakeholders´ resources. It shows how the different stakeholders are embedded in the organization as well as showing the different types of resources they bring to the transactions. The empirical case also analyzed how the steps of the TLM model apply at the organizational level. In particular, shared strategies, KPIs and organizational values represent the commonalities in the ION and promote the sense of "we-ness". The values and strategies are not "mine" or "yours", they are "ours", they are organizational. The study also provides evidence of a positive impact of the TLM on developing and strengthening the organizational "we" and its positive impact on performance. In particular, respondents highlight through storytelling how this type of learning process promotes cooperative rents.

2. Contributions to the Literature

This research aims to contribute to the ongoing work on a relational view of economics (Wieland 2020a; Biggiero et al. 2022) as well as to the literature on organizational learning and on transcultural learning. In terms of the relational view, this work aims to conceptualize organizational learning within the framework of relational economics and thus contribute to a relational view of the organization and organizational learning. As the research focuses on organizational learning, it also aims to contribute to the literature on organizational learning. In particular, by conceptualizing organizational learning beyond human cognition, organizational relational learning does not presuppose the existence of an organizational mind and avoids the limitations associated with anthropomorphization. It also aims to contribute to distinguishing two phenomena: A cognitive individual phenomenon in the organization (individual learning within organizations) and an organizational social phenomenon (OL). Although the organization can be a setting for individual learning, organizational learning would be a different phenomenon. In this way, as suggested by Engeström and Kerosu, organizational learning would be conceptualized "beyond the skin of the individual, to examine collectives and organizations as learners" (2007: 337). This distinction would be possible by shifting from methodological individualism to methodological relationism in organizational research. In particular, methodological relationism allows organizational learning to be conceptualized as a micro-meso phenomenon that goes beyond cognitive approaches to learning. As for the TLM, this research aims to contribute to the conceptual development of the model. Specifically, it sought to further conceptualize the TLM as a model for relational learning in organizations.

The added value of this research in relation to existing elaborations on organizational learning and, more generally, on organizational learning that take a social approach to learning lies in the conceptual elaborations in terms of theoretical metaconstructs. To my knowledge, there is no research on organizational learning that explicitly relies on metaconstructs to provide a theoretical foundation. In particular, this research relies conceptually on methodological relationism. Unlike much of the existing literature, this research clarifies the ontological status of organization. Although the research does not aim to contribute to philosophical debate, it integrates some philosophical concepts to strengthen the theoretical foundations of the research project. In this way, it also contributes to an inter-disciplinary view on the phenomenon of organizational learning.

3. Limitations and Further Research

As the limitations of the case study at the ION have already been presented and discussed at the end of chapter seven, the limitations in this conclusion refer to the general limitations of the research.

The research focused on organizational learning as a process that concerns the organizational entity. In this way it helps to distinguish between learning *in* the organization and learning *by* the organization. As an entity in its own right, the organization would also learn different things compared to individuals. For example, the ability to produce cars and meet the needs of customers is a skill that many car manufacturers possess, not just individual employees. Although employees naturally contribute to some parts of the car production/customer satisfaction process, the capability is organizational. Individual employees leave, generations change, and the company continues to produce cars and (not always) satisfy its customers. This is an example of outcomes of organizational learning. Although it is intuitive that organizations learn different things, this research project did not conceptually analyze what exactly are the outcomes of organizational learning as a process of relationalizing rationalities. Further research should focus on conceptualizing what is learned by the organization.

This research is also based on a very specific nature of organization. The elaborations and results are only valid if one considers the organization as a nexus of stakeholders´ resources, which implies an inter-organizational view of the organization.

In reviewing the literature on organizational learning, the researcher has endeavoured to include the most relevant literature and supplement it with more recent literature to provide a good overview. Nevertheless, the review was limited to 76 papers, which do not represent the entire literature on the subject. Although, to my knowledge, no literature review could encompass the entire literature on a given topic, biases associated with the selection of papers, even if limited by the selection criteria, cannot be completely eliminated.

This research draws on the model of transcultural learning and CoPs for operationalizing organizational learning as conceptualized here. Other possible models and concepts could lead to different findings and can be therefore explored in further studies.

Appendix

1. List Literature Review on OL

Below is a list of the papers and books included in the semi-systematic literature review discussed in chapter two. In the table, the papers and books are listed in alphabetical order by scholars´ surname.

Year	Scholar(s)	Title	Journal/Book
2011	Anzanello, M. J., Fogliatto, F. S.	Learning curve model and application: Literature review and research directions.	International Journal of Industrial Ergonomics
2011	Argote, L., Miron-Spektor, E.	Organizational learning: from experience to knowledge.	Organization Science
2011	Argote, L.	Organizational learning research: past, present and future.	Management Learning
1978	Argyris, C., Schön, D.	Organizational learning: A theory of action perspective.	Addison-Wesley
1991	Argyris, C.	Teaching smart people how to learn.	Harvard Business Review
1995	Argyris, C.	Action science and organizational learning.	Journal of Managerial Psychology
1997	Argyris, C., Schön, D. A	Organizational learning: A theory of action perspective.	Revista Espanola de Investigaciones Sociologicas
2004	Bapuji, H., Crossan, M. M.	From questions to answers: Reviewing organizational learning research.	Management Learning

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2017	Barao, A., Vasconcelos, J. B., Rocha, A., Pereira, R.	A knowledge management approach to capture organizational learning.	International Journal of Information Management
2000	Beeby, M., Booth, C.	Networks and inter-organizational learning: a critical review.	The Learning Organization
2019	Binder, P.	A network perspective on organizational learning research in tourism and hospitality. A systematic literature review.	International Journal of Contemporary Hospitality Management
2017	Brix, J.	Exploring knowledge creation processes as a source of organizational learning: A longitudinal case study of a public innovation project.	Scandinavian Journal of Management
1991	Brown, J. S., Duguid, P.	Organizational learning and communities of practice: Toward a unified view of working, learning, and innovation.	Organization Science
2010	Bruneel, J., Yli-Renko, H.; Clarysse, B.	Learning from experience and learning from others: How congenital and interorganizational learning substitute for experiential learning in young firm internationalization.	Strategic Entrepreneurship Journal
2021	Carmeli, A., Zivan, I, Gomes, E., Markman, G. D.	Underlining micro socio-psychological mechanisms of buyer-supplier relationships: Implications for inter-organizational learning agility.	Human Resource Management Review

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1993	Cook, S. D., Yanow, D.	Culture and organizational learning.	Journal of Management Inquiry
1999	Cook, S. D., Brown J. S.	Bridging epistemologies: The generative dance between organizational knowledge and organizational knowing.	Organizational Science
1995	Crossan, M. M.; Lane, H. W.; White, R. E., Djurfeldt, L.	Organizational learning: Dimensions for a theory.	The International Journal of Organizational Analysis
1999	Crossan, M. M., Lane, H. W., White, R. E.	An organizational learning framework: From intuition to institution.	Academy of Management Review
1984	Daft, R. L., Weick, K. E.	Toward a model of organizations as interpretation systems.	Academy of Management Review
1993	Dodgson, M.	Organizational learning: A review of some literatures.	Organization Science
1978	Duncan, R. B., Weiss, A	Organizational learning: Implications for organizational design.	Chapter in: Staw, B. (ed.): Research in Organizational Behaviour, JAI Press, 75-123
1997	Easterby-Smith, M.	Disciplines of organizational learning: Contributions and critiques.	Human Relations
2000	Easterby-Smith, M., Crossan, M., Nicolini, D.	Organizational learning: Debates past, present and future.	Journal of Management Studies
1998	Edmondson, A., Moingeon, B	From organizational learning to learning organization.	Management Learning

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2003	Elkjaer, B.	Organizational learning: The “third way”	5th International Conference “Organizational Learning and Knowledge”
2007	Engeström, Y.; Kerosuo, H.	From workplace learning to inter-organizational learning and back: The contribution of activity theory.	Journal of Workplaces Learning
2009	Gherardi, S.	Knowing and learning in practice-based studies: An introduction.	The Learning Organization
2017	Gibb, J., Sune, A., Albers, S.	Network learning: Episodes of interorganizational learning towards a collective performance goal.	European Management Journal
2013	Heikkila, T., Gerlak, A. K.	Building a conceptual approach to collective learning: Lessons for public policy scholars.	The Policy Studies Journal
2003	Holmqvist, M.	A dynamic model of intra- and interorganizational learning.	Organization Studies
1991	Huber, G. P.	Organizational learning. The contributing processes and the literature.	Organization Science
2011	Jiménez-Jiménez, D., Sanz-Valle, R.	Innovation, organizational learning, and performance.	Journal of Business Research
1993	Kim, D. H.	The link between individual and organizational learning.	Sloan Management Review
1998	Klimecki, R., Laßleben, H.	Modes of organizational learning. Indications from an empirical study.	Management Learning

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1998	Klimecki, R., Laßleben, H.	What causes organizations to learn?	3rd International Conference on Organizational Learning 6-8th June 1999; Lancaster University (UK)
2002	Knight, L.	Network learning: Exploring learning by interorganizational networks.	Human Relations
2009	Kolb A. Y., Kolb D. A.	Experiential learning theory. A dynamic, holistic approach to management learning, education and development.	Chapter in: Armstrong, S. J., Fukami, C. (eds.): Handbook of Management Learning, Education and Development, Sage publications, 42-68
1998	Lane, P. J., Lubatkin, M.	Relative absorptive capacity and interorganizational learning.	Strategic Management Journal
1998	Larsson, R., Bengtsson, L., Henriksson, K., Sparks, J.	The interorganizational learning dilemma: Collective knowledge development in strategic alliance.	Organization Science
1998	Leonard, D., Straus, S.	Putting your company´s whole brain to work.	Harvard Business Review
2018	Le Pennec, M., Raufflet, E.	Value creation in inter-organizational collaboration: An empirical study.	Journal of Business Ethics
1995	Levinson, N. S., Asahi, M.	Cross-national alliances and interorganizational learning.	Organizational Dynamics

Appendix

2021	Levinthal, D. A.; Rerup, C.	The plural of goal: Learning in a world of ambiguity.	Organization Science
1988	Levitt, B., March, J. G.	Organizational learning.	Annual Review of Sociology
2002	Lipshitz, R., Popper, M., Friedman, V. J	A multifacet model of organizational learning.	Journal of Applied Behavioral Science
2018	Liu, C. H. S.	Examining social capital, organizational learning and knowledge transfer in cultural and creative industries of practice.	Tourism Management
2016	Lo, F., Stepicheva, A.	Relational capital, strategic alliances and learning. In-depth analysis of Chinese-Russian cases in Taiwan.	Chinese Management Studies
1991	March, J. G.	Exploration and explotation in organizational learning.	Organization Science
2021	Morandin, G., Russo, M., Bergami, M.	Imagining the newcomer-supervisor relationship: Future relational self in the workplace.	Human Resource Management Journal
1998	Nahapiet, J., Ghoshal, S.	Social capital, intellectual capital and the organizational advantage.	Academy of Management Review
2014	Nissen, H. A., Evald, M. R., Clarke, A. H.	Knowledge sharing in heterogeneous teams through collaboration and cooperation: Exemplified though public-orivate-innovation partnerships.	Industrial Marketing Management
1995	Nonaka, I., Hirotaka, T.	The knowledge-creating company. How Japanese companies create the dynamics of innovation.	Book

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1998	Nonaka, I.	The knowledge creating company.	Harvard Business Review
2009	Nonaka, I., Toyama, R., Hirata, T.	Management flow. A process theory of the knowledge-based firm.	Book
2019	Nyman, M. R.	Collective learning in organizations – opportunities and constrains: Case study of an avalanche blocking a railway line.	Risk, Hazards & Crisis in Public Policy
2002	Orlikowski, W. J.	Knowing in practice Enacting a collective capability in distributed organizing.	Organization Science
2005	Paavola, S., Hakkarainen, K.	The knowledge creation metaphor – An emergent epistemological approach to learning.	Science & Education
1998	Popper, M, Lipshitz, R.	Organizational learning mechanisms. A structural and cultural approach to organizational learning.	Journal of Applied Behavioral Science
2000	Popper, M., Lipshitz, R.	Organizational learning. Mechanisms, culture, and feasibility.	Management Learning
1994	Rashford, N. S.	The dynamics of organizational level: A change framework for managers and consultants.	Addison Wesley
1996	Schein, E. H.	Three cultures of management: The key to organizational learning.	Sloan Management Review

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2021	Schwengber, J. G., Kindlein, B. B.	Building bridges not silos: Organizational learning processes and the role of a shared lingua franca as an a priori requirement for transcultural cooperation.	Chapter in: Montecinos, J. B., Schwengber, J. G., Wieland, J. (eds.): Relational Leadership – Case Studies from Brazil, Metropolis, 243-264
2003	Selnes, F., Sallis, J.	Promoting relationship learning.	Journal of Marketing
2006	Senge, P. M.	The fifth discipline. The art & practices of the learning organization.	Book
1983	Shrivastava, P.	A typology of organizational learning systems.	Journal of Management Studies
1991	Simon, H. A.	Bounded rationality and organizational learning.	Organization Science
2011	Singh, S. K.	Leadership & organizational learning in knowledge management practices in global organizations.	The Indian Journal of Industrial Relations
2021	Thygeson, N. M., Logan, C., Lindberg, C., Potts, J., Suchman, A., Merchant, R., Thompson, R.	Relational interventions for organizational learning: An experience report.	Learning Healthy Systems
2020	Tortorella, G. L., Vergara, A. M. C., Garza-Reyes, J. A.	Organizational learning paths based upon industry 4.0 adoption: An empirical study with Brazilian manufactures.	International Journal of Production Economics

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1993	Weick K. E., Roberts K. H.	Collective mind in organizations: Heedful interrelating on flight decks.	Administrative Science Quarterly
1998	Wenpin, T.; Ghoshal S.	Social capital and value creation. The role of intra-firm networks.	Academy of Management Review
2020	Wiewiora, A., Chang, A., Smidt, M.	Individual, project and organizational learning flows within a global project-based organization: Exploring what, how and who.	International Journal of Project Management
1936	Wright, T. P.	Factors affecting the cost of airplanes.	Journal of Aeronautical Sciences
2005	Zaheer A., Bell G. G.	Benefiting from network position: Firm capabilities, structural holes, and performance.	Strategic Management Journal
2018	Zhu, Q., Krikke, H., Caniels, M. C. J.	Supply chain integration through managing inter-organizational learning.	International Journal of Operations & Production Management

2. *Informed Consent*

The following presents the informed consent form sent to each interviewee. All interviewees signed and returned it to the researcher before the interview.

TITLE OF STUDY
Organizational Learning for Transcultural Cooperation[61]

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PURPOSE OF STUDY
You are being asked to take part in a research study. Before you decide to participate in this study, it is important that you understand why the research is being done and what it will involve. Please read the following information carefully. Please ask the researcher if there is anything that is not clear or if you need more information.

STUDY PROCEDURES
"Organizational Learning for Transcultural Cooperation"[62] is a PhD research project which focuses on transcultural learning processes within organizations.

[61] The final title of the study was changed after the interviews to the current title of this thesis.
[62] See previous note.

This interview will be part of the data collection. During the interview, an audio recording will be made; afterwards the interview will be transcribed and analyzed.
The research will be published later.

CONFIDENTIALITY
Your responses to this interview will be anonymous. Every effort will be made by the researcher to preserve your confidentiality including the following:

- Assigning code names/numbers to participants that will be used on all research notes and documents
- Keeping notes, interview transcriptions, audio files and any other identifying participant information in a locked filing cabinet accessible only by the researcher.

Participant data will be kept confidential except in cases where the researcher is legally obliged to report specific incidents.

CONTACT INFORMATION
If you have questions at any time about this study, or you experience adverse effects as the result of participating in this study, you may contact the researcher whose contact information is provided on the first page. If questions arise which you do not feel you can discuss with the primary researcher, please contact Dr Julika Baumann Montecinos, julika.montecinos@zu.de, +49 7541 6009 2264.

VOLUNTARY PARTICIPATION
Your participation in this study is voluntary. It is up to you to decide whether or not to take part in this study. If you decide to take part in this study, you will be asked to sign a consent form. After you sign the consent form, you are still free to withdraw at any time without giving a reason. Withdrawing from this study will not affect the relationship you have, if any, with the researcher. If you withdraw from the study before data collection is completed, your data will be returned to you or destroyed.

Appendix

CONSENT

I have read and I understand the information provided and have had the opportunity to ask questions. I understand that my participation is voluntary and that I am free to withdraw at any time, without giving a reason and without cost. I understand that I will be given a copy of this consent form. I voluntarily agree to take part in this study.

Participant's signature _______________________________ Date _________

Researcher's signature ______________________________ Date __________

3. *Transcriptions*[63]

3.1 Interviewee A

Researcher: I would like to start by asking you how you would describe the [ION]?

Interviewee A: So, the [ION], first we have to look at its history, so it is a construct that is 10 years old, it is a true representation of what diversity means at [organization´s name]. I think that if you look over the fact that we have over 20 [subsidiaries] and over 17 countries represented, one of my favourite things is to see the [ION] coming together, whether we do that virtually or in person, we really see the power of what is possible when bound together so many different countries and all these different perspectives. Some of the [subsidiaries] are larger than others and so the learning and exchange that happens and the way that we all have an opportunity to be better in what we do is there because of the [ION]. It´s a construct that is there to support us in day-to-day, month-to-month operations and then to give the governance, the rigour, the insights track in terms of access are super important and that´s possible because of the [ION].

Researcher: Thank you. And why do you think that different countries and different perspectives is something positive?

Interviewee A: I do for few reasons. One is just because simply having a different perspective on something you are trying to do, a problem that may be trying to solve, an opportunity that you maybe have neither considered and for somebody else in another country has already come before you. So, the notion of experience I think is super important. I have very concrete examples of that, I can give you one right now which is in [name of a country in each ION has a subsidiary]. We all have a very common goal which is around zero distance to customer and working with customers. Last year the offside where we were together, in [country of interviewee A] actually. A very important moment for

[63] The interviews followed a semi-structured approach. This means that although the researcher had a questionnaire, once interesting concepts arose in the interviews, these were discussed in detail. To ensure anonymity, some passages of the interviews have been changed. [] have been used in the cases in which the passages were changed by the researcher. () have been used for explanations. A naturalized approach was adopted during the transcriptions. This means that the grammatical and stylistic errors have not been corrected.

me was when I presented what we were doing with customers and then, simply in a one-to-one walk, that could have happened by skype or zoom, with [MD from another subsidiary] in talking and exchanging about what he is doing it just opened my eyes to different possibilities. So, I think that having that diverse perspective in terms of experience, and also just having a sensitivity to things that may work, that could be adapted and localized is super important. After I know that will be one question that we will talk about, but I spent a quick bit time chatting with, in meetings with other MDs and other CEOs, understanding what we are doing, how does that work in our market and to really talk through somebody ideas. Sometimes we do those together from network´s initiatives and sometimes we do it just to learn from each other. When you look at sizeable [subsidiaries], you mentioned [name of a country where there is a subsidiary], as an example with them we are trying to start different initiatives, they turned to [country of interviewee A] for some inputs, I after will turned to them or I will turn to [another country where there is a subsidiary], a larger [subsidiary], so it is very important.[64]
Researcher: Thank you. And which goal does the [ION] pursue?
Interviewee A: So, we have KPIs that consist of to cross the [ION]. What I love about this is that we have some opportunities to localize and interpret what will work best in our local market, so there is a red thread, if you will, in terms of the KPIs consistently, so we all have the same base line to start from. Some of these KPIs for example are growing relationships with the local eco-systems, so for that we mean working with the local universities to make sure that we are working as good partners with the universities, not just for being able to recruit from those universities, but also to show the top leaders, to give back, to be able to do sponsorships, do different things, innovation events, work with the local start-ups, sometimes, as you know, some of those universities will have local incubators that is part of the university. For us is important making sure that we´re investing within the universities and getting closer to the students and working with professors to be good partners. Start-ups, community, partners, anything that we do for a corporate social responsibility perspective. There is a very great example where eco-system that we all have as a common KPI and then in [country of interviewee A] we interpret that to be really focused on three specific pillars, so for example, for us digital leader is seen as very important, working with the younger generations, so you see us doing sponsorships in very meaningful events with our eco-system around digital leaders. Another one for

[64] Passage not fully understandable.

us would be around women in leadership, women in entrepreneurship. I will particularly invest my own personal time and those of the team and those of the location to really be top leaders and to be a role model around on what´s advance womanist looks like in [country of interviewee A], and what it looks like at [organization´s name]. And then also entrepreneurship in general in eco-system is another one very important, and then of course any advocacy work that we do. So that is one example of a common KPI around the ecosystem. Another, actually you heard by now, is around driving engagement, to unify all of the employees in a single location to bring them together so they have opportunities to maybe meet someone new, collaborate in a new way, innovate together, maybe think a little bit differently because of a happy collisions that might happened because an event where we brought everybody together. Sometime those events are around very specific topics, meeting, important guests that have an important perspective, introducing employees to somebody that is new in a coffee corner, or it could be for an innovation opportunity, so sometimes we will host innovation events, hard thoughts, to bring everybody together, and sometimes it is just good social funs, summer parties or holiday parties. We take [country´s day] very seriously, so [name of the country of interviewee A] day is a big celebration and in [name of the country of interviewee A] we talk also a little bit about it later. I suppose we also do everything at least three times because in [name of the country of interviewee A] we have a [subsidiary] in [city], we have a [subsidiary] in [city], two offices in fact, and then a [subsidiary] in [city], so all across the country, and then we have headquarters, sales headquarters that we also have developed in [city] and then two sale offices. From [city] where I am today to [city] is 6 hours flight, 3 hours' time difference, probably 10 degrees temperature difference, so is quite a big country and so it means that whatever we do in terms of engagement we typically have to do three separate events, not now because everything is turning virtual so we can do something for the whole country.

So, engagement, eco-system and the other one is around general innovations, so spaces, places in a fancy to drive innovation and bring teams together so they can collaborate. Often, they work in the line of business, they have all of this work to do, they have backlogs to work on, costumers to deliver for and we need to be able to bring the location together to maybe have the opportunity to showcase what they are doing and maybe learn something different. And doing so we also drive a lot of learning in the organization, so big learning events they cut across the whole organization, you hear people talking about [not understandable word + a series of technical words], so all different types of learning events.

Researcher: You used the expression "learning organization". How would you define learning in organization?

Interviewee A: Well, we have a model that´s 70-20-10. So 70% of the learning, and that has certainly been my experience in my career, 70% of the learning happens on the job, in projects, in fellowships. We have the construct of mini fellowship, or maybe you can go for six months to work within another team, but you can build that empathy and understanding by spending a short burst of time with another team. We try to do those in the location very much, learning through just living in the shoes of another team, so we have rotation programs in [location] where somebody in development can spend six months in a sales role, costumer facing. Those are beautiful opportunities for both the receiving, you know the host team, and the team that is sending the employee over. So, on the job I would say is a big percentage. And then in this new world of course this idea of continuous learning has to be very present, right, because everything is changing so quickly. Your life expectancy is gone be way longer in terms of your career opportunities and mine, and so this idea that we have to work together to be able to have a mindset that we should be continuously learning and stay in sharp and know the new skills, this is very important. The other piece of it is of course, you know, formal training, but that´s really 10% of my overall roadmap. I would say over my career has been actually formal training, after the university anyway, so there´s a great deal of learning that happens in a formal way, a catalogue of opportunities to sign up for different courses and to be will that there are self-paced. And then a big piece of it is of course experiences and networking connections and all the learning that happens through that. A long answer, I do not know if…

Researcher: Yeah, it´s ok, because my focus is on organizational learning, for this reason I asked it.

Interviewee A: Maybe I could add for you. I think it is also modelling is super important. If you think about different role models that you have in organization, so the leadership, developing leadership, making sure that people feel that they have accountability. They have responsibilities, that I show up in the morning and what I contribute has a bigger impact, that it is purpose-driven, that it´s helping a customer. This is super important and any opportunity that we all can have to be learning from our leaders and what they model as part of our learning, on what we need to be striving for or modelling ourselves…that cascade is very very important in my opinion.

Researcher: Yeah, I agree. And coming back to the [ION]. What kind of information do we exchange with your colleagues?
Interviewee A: So, every two weeks we have, we meet every two weeks all the MDs and the CEOs. There´s always a formal agenda that´s built in advance, it´s cross towards from the different needs of the different [locations]. Typically, we will… this is what I mean about access, [ION] is the super powerful engine to be able to bring very special topics that are maybe, location diagnostic to the table so that we can, you know, hear what is coming, understand more deeply what has already been launched and have input onto very specific initiatives from a global perspective. It is a powerful opportunity. So, those are more formal, and then there´s what I call the informal exchanges that happens, and we all do this. I have a cadence with almost every one of the MDs. I did the same when I was COO - I only became MD 90 days ago, I don´t know if anyone share that with you. So, when I first started at [organization´s name] 6 years ago I was Chief Operating Officer for [location], and I just recently I take the MD role. So, in both capacities having that connection, what is a beautiful opportunity for me to be able to pick up the phone and speak to, you know, somebody in [another location], to say ok, this is what we´re living. Even now with covid-19 global pandemic, the learning and the power of the organization during this global pandemic is one of those, you know, strongest muscles I have seen because China went first and we learned so much and that learning made us smarter and more efficient and probably much more effective in kept people safer because of the learning of the [ION] and the [subsidiaries] that came before [location]. The power of exchanging, to say to [another location]: "What are you doing? How is it looking? to say to [another location]: "I´m about to open the office again for 20%. What has your experience been? What works?" Some of this is new, there is no roadmap, there are some great global guidance, but there is also just experience. Exchange is very very powerful, it is a board of mentors, if you will, and we do that for each other.
Researcher: And in which way do you think this exchange could be useful for your [location]?
Interviewee A: Well, in two ways. That´s a good question. The first is that just as I have said earlier, this learning, right? It is to seat at the table to understand what is coming, so we can be in better position to take care of our internal customers. So maybe just a disclaimer: For me, our customer is the employees in our [subsidiaries]. So, one is just the learning intensity foreshadowing of things that are coming, so were in better position to be able to adapt, to respond, you know, be ahead of the curve in service of taking care of everybody in the

location. And the other is just also to give back, it is to exchange. So, it happens often when [location] will have a new initiative or a learning that will put up her hand and say we would like to offer this to the [ION]. A great example of that, I don´t know if it was announced yet, but we have this construct called [name of an initiative]. Does anyone talk to you about [name of an initiative]?

Researcher: No

Interviewee A: Ok. [name of an initiative] is like, you probably see a maker space. Do you have any at your university? It is like a cool space that gets a lot of fan track where people can go and learning how to use a 3D printer, and this kind of things. Have you ever seen that?

Researcher: Yeah!

Interviewee A: So, we call it [name of an initiative], these maker spaces, and we have one in most of our [subsidiaries]. In [location] we have five of them one of each location, 4 actually, sorry. So that is an example where all of our [subsidiaries] have a [name of an initiative] and they have employees that volunteered to run those [initiative] and to run events for the employees. And our community lead, our volunteer that is in [city], in our [city] office has done such a great job over the last five years, and in many cases, we have shown up, to your question, and shared with the [ION] some of the wins and the great stories. When the [ION] came to [location], we showed them and toured them through all of the great activities of the [initiative] is doing and now today, the person in [city] has been offered a volunteering opportunity to run the global [initiative], to create a network. So, it is coming from [city], but this person will now step up and help all of the [subsidiaries] to share best practices on things that I worked in [city] and then to take all these ideas and share them across. It´s a beautiful opportunity, something that, you know, grassroots, that has started in [city] and then talents and effort was recognized, and this person now will have a global stage to be able to exchange. So often it’s us giving back and us, you know, receiving. But I think that is a great example maybe to share.

Researcher: Yeah, it sounds great! Have you ever applied some innovation or simply tips and tricks that you got from the other [subsidiaries]? So, for example, you gave me an example of exportation of ideas. Now I´d like to know if you imported ideas as well?

Interviewee A: Yes, absolutely, and I will give you some concrete examples. One of the most recent, so we had some speakers coming in from [organizational name] to talk about analysis they did around the moments that matter for an employee in their journey at [organization name], and one of the comments that mattered was of course the opportunity to have an executive recognizes hard

work and to reach out and make a connection now, especially right now, as we all work from home. That was a best practice and [another subsidiary] had stepped up. So, in this presentation, they talked about how they rolled out the initiative that I´m going to talk to you. So, in that exchange, again, of all the ideas of [subsidiaries] you can take it or leave it, but that was one that I thought: “This is going to be a little bit tricky to implement but it will have big impact”. So, I took it back to [subsidiary] and basically, we rolled it out in every one of our [subsidiaries in the country]. So, we chose to do it all across the country and what that was, was that we pulled a list of the people at [organization´s name] in [subsidiary] that had received the most appreciation and acknowledgement for hard work by their colleagues, and then we sent them a personal note from an executive saying: “We see that you have been appreciated by your colleagues. We love that you´re doing such a great work. Thank you! and we´d love to spend a half an hour to have coffee together”. And then we booked a session where at the end of it there was over a hundred employees in [subsidiary] that all had a one-to-one with an executive in [subsidiary]. And what was beautiful about that of course is that the employees, I think, loved the experience but the executives also. All took the part themselves to write a little brief: “I met [researcher´s name as example], she is so lovely, she does this”. And so, it was really good, I think everybody appreciated the effort. That is a small example, but that created a lot of great engagement and learning as we started to meet new colleagues. That was an example. Another would be around, I would say, location strategy. So as we are in looking at our spaces for real estate in our portfolio in [subsidiary], we have five offices, very important for me it to be able to…yes I am working with the [ION], I am working with the facilities team, but I´m also checking in with other MDs to understand their experiences, what worked as they were going through their business cases. I´m in right now with our business case in [city] and for sure I have adopted some of the strategies from a few of my colleagues MDs. So, again, I just, you know, being sharpened and learning from their experiences is super important. Those are two examples of many.
Researcher: In the beginning of our interview, you spoke about localization. So how do you apply the ideas that you got from your colleagues?
Interviewee A: Well, I´ll give you another example. You know we´ll talk very… proscribed meetings around, let´s say, innovation and so get KPIs around working with universities, being close to customer, and so we´ve seen some examples from other [subsidiaries] of the way they´ve interpreted that, maybe through different innovation events. So, then we will take it back. We have an example where in [subsidiary] we then decided: “Okay, are relationships with

sales and this customer particular? You know, has a need?" that´s an opportunity that we can maybe partner together and then let´s bring in a local University. We have examples where we´ve brought in MBA students maybe instead of a… you know, an example that we had from the [ION] where maybe it was an engineer and this was a MBA student, purposely chosen because we wanted to recruit more MBA students from the local University. We brought them in to do a design thinking session, we coupled it with a customer and ran this big innovation event. So, taking pieces of what other [subsidiaries] have done, maybe its micro events and then, in this example, we strung it all together and put together this much larger event. It is an example of just picking up on the nuances of that work to that work, how could we meet it together to make something new. This is an example I can share.

Researcher: Ok. Thank you for sharing. In general, in what way do you believe this network impacts on the innovative capabilities of the [subsidiaries], for example [the subsidiary run by interviewee A]?

Interviewee A: So, Innovation, so a few things to talk about in terms of innovation. The first is that it is clear that that is a big cornerstone of why we exist, you know, the innovation that is happening in the R&D organization, which is the [ION]. So there´s a few things. One is to be able to nurture that in a way that´s meaningful. So, as I spoke about earlier, potentially by bringing teams together that might not otherwise meet through different types of events and the spaces in the things that we do to support innovation in a meaningful way. The other is to introduce customers into the process, so to build the bridge between sales, the market unit and the [subsidiary], those who are in engineering and development to make sure that there´s a good bridge there, so that we can bring customers to the table to help them but also to have this exchange. So you´ll see us get very close to like a local user groups for example and very specific qualified opportunities with customers. The other is just seeding a spotlighting innovation in a way as such, so bringing in what I say the outside in. So maybe bringing in the start-up ecosystem into the [subsidiary], so we can see examples of start-ups that are just being very agile, that have a mindset that is so much entrepreneurial, so that people can be, the employees can relate to, ok? This is a very different thinking, right? So, we are always trying to see that entrepreneurial or intrapreneurial mindset within the [subsidiary]. Sometimes to have examples is very important. So being a start-up, being a customer that comes in to speak. I give you an example where we were about to run an [event]. So, we organized this entire day of learning about how to be… the best practices of building in [space]. Well, we are going to bring a local customer that is going to tell their story and their journey having the employees here, the good, bad and ugly experiences that customers have had with our [product] is a great thing and helps them to build empathy and understand who they are building for. So those are other ways that we can really seed innovation. And then the last one would be around simply showing the location´s examples of innovations that are happening. It happens a lot that we talked about new innovation, but sometimes we forget that we have to celebrate the innovations that are happening, and so taking those moments, right? Everyone is waiting for these big breakthrough milestone celebrations and the teams themselves will celebrate, they will have release parties and do all sorts of things within their teams. But where the [subsidiary] comes into play is to build a spotlight like those, to build a pride in the locations of people feel: "Wow, you know, this is this is a big… I´m part of something bigger", whether it is the location or the larger purpose of [organization´s name]. It is super important. And so, you´ll see us do lots of very meaningful events that are small and easy to do but that spotlight the teams and all their successes and their spectacular failures. It´s important that we also are able to create a culture where people feel comfortable teams, to be able to talk about what we experimented, "this didn´t work out". Failure is a big part of learning. I like to say it is experimentation. And we do that! One example in [subsidiary], we just did one yesterday, we´re doing another one today, we will celebrate, we will bring the locations together to recognize your years of service, so: "Thank you [researcher´s name as example] for your 5 years of service". I will have colleagues that are purposefully planted in the presentation to surprise you and there´ll be a colleague that will tell a great story: "I remember [researcher´s name as example] when she first started". Very important the role of celebrating. And then what we´ll… the transition that event into key milestones: Innovations, teams that went the extra mile, individuals that did something that was above and beyond. So, we put a spotlight on the team, we let them talk about why they feel it was a win and what the learning was, and we feel that that´s s very important because other teams learn from those experiences and a built-in overall pride and its part of healthy culture.

Researcher: Yeah, of course.

Interviewee A: Usually there are cakes!

Researcher: In Germany we love cakes.

Interviewee A: We love cakes in [location] too. Cake is universal!

Researcher: Yeah, parties and cakes and coffee are universal.

Interviewee A: Yeah, coffee, I love coffee!

Researcher: Me too. [Organization´s name] as a whole has a strategy, but at the same time each location has its own peculiarities. In what way does this network help you manage the challenges and opportunities of your specific location?
Interviewee A: So, you´re right. I mean that the strategies or, as you know, as managing director, our role is definitely to cascade that strategy through the organization, create opportunity for people to exchange with each other and to build on that strategy, to spotlight what´s happening in the location that is aligned to the strategy. Your question is around peculiarities, so around specific ways that we interpret that in [subsidiary], I guess. Well, a few things. One is: We want to put the leaders forward, right? So, the beautiful part about running a [subsidiary] is that we´re [not understandable]. This is super important. What makes us truly unique is that we take care of everybody in the location. It´s not a board specific mentee. And so that puts us in a very unique opportunity to bring and connect people across board areas that could be powerful opportunities. And so, because of that, the fact that we are knitting everybody together in a location, creating this identity that its bigger than just: "I work for this line of business in this floor of this building in the city. I´m tied to something much larger" is super important. And so then there´s also the, you know, this is the KPI, this is the strategy and how we going to look like that. And so, we have an answer to that in [subsidiary] and I can share with you if you´re interested.
Researcher: Of course.
Interviewee A: We have again the complexity of a number of locations. In [country] there are 4. So, we´ve created an executive leadership team (ELT) and we have reached out to key members of the location that have large size teams, large influence and passion for the location, so they can have a global role. They could have a team in [city], but they´re really… they leave their day job at the door, and they think about the location. And so, what we do is…We create these ELTs in each one of our locations, typically about 8 members. It´s a membership, so we treat them like a board. So there´s six meetings a year. And what we do is we take the [ION] goals and we host a workshop, and we establish the goals that they are going to work on as an extension of our team. And why I say this to you to answer your question is because it´s a very interesting opportunity when you can take the strategy, the goals and then cascade it to some of these leaders and have all these perspectives from different board areas coming together with a sole purpose which is around how to drive the strategy in the location. And so that´s one of our answers to interpreting the strategy and being able to have these leaders commit to something that´s [city] or [city] or [city] specific and then put them up then all the execution. Then all the events in the activities that will

happen to put those leaders up front to be cascading the strategy, to be talking about the big picture goals. I think its super important and (it) comes back to modelling what we talked about earlier.

Researcher: Thank you very much for sharing. This answer was really insightful for me, really useful.

Interviewee A: The leadership, the ELTs, is something that is super helpful because of the fact that we have more people helping us but it´s not more people, it´s the quality of the people and why they show up. They really volunteer time, to get back to the location and they create an identity for the location. Sometimes those goal may be very specifics for the locations that localize, which was your question earlier, but also, they always tie back to the overall strategy and [subsidiary] KPIs, always!

Researcher: Interesting! Thank you. Now I would like to go a little bit deeper in order to understand the dynamics in the network. So which role do different values play in the achievement of the Network´s goal? different values that exist within the [ION].

Interviewee A: So, when you say values, I think about, you know, on our [organizational slogan] values. Has anyone talked to you about "[Organizational slogan]"?

Researcher: Yeah!

Interviewee A: Ok. we have [name of an initiative] and I also was part of a project around how we build the values that are… Are there values that are particular for engineering? It was the question that we looked at as part of our culture renewal. And so, you think about values, like your question, how do they manifest themselves in the [ION]. Very clearly, they do in my opinion. I think about [value][65] as a value. When you look at the [ION], it is very much about a construct that is able to give feedback on topics that were often asked, right, to come forward and to be able to share and to give inputs on some early initiatives that are going to be rolled out. So, it´s an incumbent on us to be able to be very frank and transparent in our feedback. Another one is [value]. So, this value of making sure that were being inclusive, but you´ve heard me talk about that just in the last little bit of time together. [value], you know, with our field colleagues, that we can get closer to customers is a great example. Building Bridges between different lines of business and a location is super important. And then also creating an environment that talks very clearly about the importance of diversity,

[65] Values have been anonymized as they are expressed in phrases that could allow identification of the ION.

inclusion is very important to spend enough time talking to you about that even today. In everything we do in creating an environment that celebrates diversity, that spotlights diversity at that creates an inclusive environment is something that you see manifest and all the different types of activities that we do. So that´s very much tighten to the values of [organization´s name], the [ION] as a as an expression of that. What else, I have a few that I love to tell how it is, one that is natural for me to adopt in how we build. So there´s a notion of innovation, so heart that all of us have KPIs that are around innovation, it´s the DNA of why we exist. So, innovation is super important, the concept of the values of being dedicated and accountable is a big one, making sure that, we´ve talked about earlier, that the people, the employees really feel that they have big impacts and in the day-to-day what they´re doing is impacting a customer somewhere, somehow. You hear the leaders speaking about the need for agility and quality, so quality around craftsmanship, right? when you think about a craft person, how they will sign their work with pride, right? This is super important. We shouldn´t be building [products] and releasing it to a customer unless we fell that we could sign our name on it and in creating that culture, those kinds of values have to be reinforced, instilled, modelled in a big way. And then the other value around, you know, safety around failure and experimentation, I think it [not understandable] nicely into innovation.

Researcher: And for what concerns your personal view. So as [interviewee A´s name], not as part of [organization´s name], how do you evaluate this diversity?

Interviewee A: That´s a big question. So, there are four projects for me in terms of diversity. So there´s gender diversity, obviously as a leader that is one that is very important to me. 7 years ago, I was an entrepreneur. I had my own business for 6 years and I sold. So, the women entrepreneurship leadership is super important as a personal passion project. This is one of the big pillars of diversity for [organizations´ name], one they´re very committed to. So, I evaluated also based on: "Are we moving the needle? What are we doing that´s going to collectively allow us to reach out targets? Do we have targets?". We do! "Are we realizing those targets? Are there examples?" and there is! I mean, look at the fact that our CEO and MD for [subsidiary] are both women, great examples for the organization. So, this is very important: "Are we measuring it? Do we have initiatives behind it? Does everyone align to why this is important? Do we have a top-down or a bottom-up approach? And the accountability". So, whether there is a KPI or not, I show up to say yes, I´ll speak on that panel, I´ll give my time. I was just part of a project of 150 women in [country] looking at gender equality and how to advance women in stem, and what´s holding them back. So, these are the kinds of things that for me I would evaluate. So that´s gender, age diversity is a big one, right? We say we can´t build great [products] unless you have that diverse perspective in that generational diversity. I measure that again and looking at, you know, at is the percentual of earlier talents, what kind of fabulous programs do we have in place? our internship program? A great example would be a very short list of companies who during COVID still kept their doors open to interns. We hire a hundred interns. In [subsidiary] we had an on board virtually, God love everybody, we were all in it together, but we got it done and I´m so proud of that, you know, that we could maintain those commitments, so that is lot about our integrity, but it is also a lot about our commitment on why its super important to have early talents perspectives at the table, whether we invite them into innovation events, formally by internships that there´s a high focus on trying to convert those interns. We have, I don´t know if anyone talked to you about the [initiative focused on interns].

Researcher: No.

Interviewee A: [Initiative focused on interns], we have dedicated people whose full-time job, budget people to put this program together. That´s whole focused on making sure that interns that come into the organization have an experience that´s meaningful. Knowing full well that not all of them will stay at [organization´s name], some of them will graduate and go to other companies, somewhere they will talk about that experience, they might become customers one day, but a whole organization is focused on making sure that they have the best experience, that they are connected. I have 50% of my team were interns, they all, just in his last cohort, have been matched up with mentors to get mentorship with some of the most senior people in the organization, it is extraordinary, it is real commitment. So again, I look for what are we doing in terms of meaningful initiatives to be able to drive the results that can be measured. The other is around differently abled, so creating an inclusive environment for those that are different able. You see this through our commitment to autism at work. You see it in [city], we have been recognized for our commitment to those that are differently abled to create environments where they can show up and be their best self at work through the presidents' group where we´ve hosted people in [city] that have different disabilities, that are able to be hosted in our [city] office for example. And then the 4th is cultural diversity. Of course, again, making sure that we create this environment where there is cultural diversity that is celebrated, that there´s an inclusiveness about how we operate our [subsidiary], so that everyone can be represented and can be their best self.

Researcher: And apart from diversity are you able also to identify one or more common points in terms of values among all managing directors of the [ION]?
Interviewee A: I would say that it´s, we spoke about earlier, I think there´s an acute understanding that it is a part of our innovation strategy. When you can tight this kind of things also to the results of being a better company and in overall showing up our best for customers. I think that´s where you see that there´s a direct correlation. And so, I think if you would ask any MD or COO or an employee for that matter, there is an acute understanding that when you are making this part of our innovation strategy, you build better solutions. We are building for a global marketplace. Our customers are differently abled, gender-diverse, culturally diverse and there´s an age diversity, of course in the customers and how they consumer our solutions. So, with that in mind you have to be building and thinking about how you build these solutions and the best way to do that is to have that diversity right at the table. From an R&D perspective you think about the approach, this would be a consistent thread all across our [subsidiaries].
It is also who we are as organization. It´s hard to not place that in the highest regard when you see such a rich environment with colleagues to show up every Wednesday, every second Wednesday on this call with 17 countries is a beautiful powerful thing. And when you live it, you understand the power of what´s possible. I would say this is a high high value for the excellence.
Researcher: Thank you. Talking about competences: What kind of competences do you do believe that a [ION] managing directors should have in order to be able to act with diversity in this context?
Interviewee A: Well, that´s a good question. More broadly in terms of, you know, what are the characteristics and what we´ve been looking for in a MD, and the first I think in resilience, right? And I say that just because, as we are living a global pandemic, to be able to…Resilience is a big quality, to be able to manage through change and to create a sort of vision, to be the kind of leader where you can create an environment where people are feeling okay. This is a construct that is going to help take care of us through this change. When you think about all that is happening right now, to have people being on the same page, on same message around what is happening next in terms of our return to work is super important. One is to be able to do connection across. So were working with multiple stakeholders in a high influence model, where all of the different lines of business are being brought together. That connection piece that I spoke about earlier is very very important. Being able to be a spokesperson and advocate, an ambassador of [organization´s name], but also of the location. I

spend a good portion of time being out there as thought leader on different topics, to be representing [organization´s name], showing up in the ecosystem, identifying opportunities where we can give back and show up in a way that is the most meaningful is another important one. And then to be able to manage a variety of tasks or running…In [location] for example we are running four small businesses, if you will, four locations, but they also have a very common mission. It is very important from an operation perspective again, you know, identifying what to be localized but then having a keen sense of where there´s a national opportunity.

Researcher: And thinking about the future: How do you think these competences could be developed? so for example, if I would like to be a managing director of the [ION] in the future, how could I develop these competences?

Interviewee A: Okay, are you interviewing? is that what is happening here [researcher´s name]? Let me help you at that! (laugh). So, I think first it is a variety of… my advice would be to any early talent to thinking about the path of becoming a COO or a MD. I think first that there is no strict path for anyone. I can talk to you, you can ask ten people someone have a very linear path, and some have a path that, you know, shows that they tried lots of different things and no one path is necessarily the right answer. I think what is important, whether you go through a regular path or not, is that you have a good depth and breadth of experience, the ability to stay curious and try different things, give yourself opportunity to open yourself to lots of different experiences. We talked earlier about learning and how experience is so important in terms of role, take projects, this notion of say yes before you say no, open a door, walk through it and then have that experience and see what you learn from it. Be willing to fail a little bit and get back up and learn from that, tell those stories. A lot of what I talk about when I speak to different panels, students, entrepreneurs, I talk about my experience as being an entrepreneur, the good, bad and ugly that came with that and how some days it was fabulous and some days it hurts. Sometime when you go through a pain points, scratch moments, that is where you have more to give back. When we think holistically about the common issues of experiences, if you have that opportunity, that then you can show up. Because as an MD or the CEO of a [subsidiary] you will on any given day you must love variety, no two days are the same and that´s not for everyone and I say that because one day you might be dealing with location´s strategy and real estate portfolio and business cases, another you might be driving this really creative, you know, all events where we bring someone to speak. You might be supporting the team to put together. Holiday party, right? That´s going to be thinking about memorable experiences for employees. You might be working on very serious topics around safety and security and audits and all these very, very important topics that… they´re all important, but how you approach those? Will you have a very different lens. And so, in preparation for all those kinds of topics and variety, I think it comes with some experience, and so my advice would be to try lots of things, you know, show up to give yourself these experiences because you will pull on them. A former MD in [location], [name], used to talk about the fact that she was with [organization´s name] for 25 years, but she worked as a chef, she worked as a detective, she did all these interesting roles and what she took for me to those, she could very much articulate. You think about a chef, for example, having that experience of being at the back of the restaurant. You need someone that is at the back of the restaurant, someone that´s at the front of the restaurant to have a well-functioning popular restaurant that is a viable business. So that kind of mindset that you bring to…Being a MD is super important. Similarly, for me, you know, as having been an entrepreneur I use that experience all the time. In terms of, even just trying to build that intrapreneurship mindset and telling stories for employees so that they can, you know, think about something differently or try something they may think is impossible.

Researcher: So, this question was part of my template. I was not trying to find a new job. (laugh)

Interviewee A: Ok. You know funny story although.

Researcher: But maybe could be useful as well. (laugh)

Interviewee A: I´m going telling you how I came to [organization´s name]. So, 7 years ago I was in the international women day at the [city]. Businesswomen network asked me if I would come in and talk to the employees about what it is to be a woman and have an own start-up. I came this close [researcher´s name] to say no, this close (sign with hands) because I had a lot of things going on, but I kept my commitments, and I did this. Really, it was such a great experience this presentation to so many and I remember walking and thinking: "What a beautiful company that they´re giving all these employees the time to listen, amazing", and I remember saying: "If this is an interview, you guys are really tough" (laugh). And I didn´t know that was somebody recruiting in the audience. You never know, right? When you step up to opportunities, you say yes before you say no, you never know where those things lead to and that has been my experience in my career for sure.

Researcher: Yeah, thank you very much for sharing your experience with me. I have two last questions. I do not know if you have time.

Interviewee A: Yes, I think I do. What time is it now are we on time? Yes.
Researcher: Okay, now I would like to turn from the network to your professional relationship with individual colleagues. So, aside from the institutional meetings in the context of the [ION], are you in contact with other managing directors on a regular basis? So, via email call, face-to-face the median is not important.
Interviewee A: Yes
Researcher: With whom and how often?
Interviewee A: Yes, so the answer is yes. So, I have a cadence with all of the managing directors on a rotation basis. So usually, we all meet with every MD or COO formally, probably at least like once a quarter. In addition to those that are formally scheduled meetings, in addition to any email exchanges or, you know, just in time if I have an urgent topic that I really need some sort of feedback on, I will definitely reach out. Then I in addition also have a formal cadence bi-weekly with the excellence COO, and [name], who you have met, this is bi-weekly. There is the bi-weekly meeting with the MD and COOs. And then I also meet with [name] on a monthly basis.
Researcher: And is there someone who is special, let´s say, in the network? I am talking about professional relationships, is there someone in the network someone who is special, or that the advices are more useful? Or they are, let´s say, equal?
Interviewee A: I think they´re all very unique. So, I have a special place in my heart for [name] and [name][66] wherever just because they are the backbone of the [name] teams, that supports so much. So, they are…What is very important is that, in this biweekly, you can show up and talk very openly and freely because… you need those opportunities to say what is happening, what do you really think is going on here? Could you meet with so and so in [headquarter country] to get some feedback on the process. This is very valuable, right? So, they´re uniquely special because they are in the headquarter and very connected and they also are unique because they have preview of all the [subsidiaries]. So sometimes it will be them that will say to me: "You know, who is working on that? [country]"; "Oh, did you talk to [country]?". So, they are the connectors, so for me, they would be my top two, added to [head of headquarter team] of course. And then if your question is particularly in the [ION] depends on the topic. It really depends on the topic. Yeah!

[66] Two employees from the headquarter.

Researcher: Nice! you gave me the same answer, all managing directors gave me the same answer: "Depends on the topic". (laugh)
Interviewee A: Because it really does! If I think about innovation, costumer I go to [country] or [country]. When I think engagement, I call [country], she (MD) makes it looks easy. It depends on the topics. And sometimes it is around the size of the location too, that´s very important. You know, the perspective that [country] will give me is sort of: "Ohh, this is about the size of [city], I need something that´s national, I need to talk to somebody that works with the complexity of multiple locations, who would that be?". So, it´s not one-size-fits-all, it is really on the topic.
Researcher: So, thank you very much. That is all from my side.
Interviewee A: not understandable
Researcher: Sorry?
Interviewee A: Very good questions. You had me thinking this morning.
Researcher: Thank you. Thank you. It was a great pleasure talking to you. Do you have questions?
Interviewee A: My only question would be, so just if you could take me to the process, so you gonna transcribe and go through all this and it is going to be part of research project. The [ION] has some sort of reviewing on that? Or what is the feedback glue to come back or is that not part of the process?
Researcher: Right now, I don´t know. I think that I will give some information to the [ION] but only…not raw information for example, everything that is related for example to your identity, I will not share with [name]. Of course, I will share the results. So for example from the interviews I discovered that there is "Baba blah blah", but nothing that is related to the identity. For example, I will not say that [name of interviewee A] told me "blab la bla".
Interviewee A: Ok. Well, you can tell her the part where I said she is my favourite. (laugh) Ok, that is my only question. It was a nice opportunity, thank you for being so professional in the way you sent the questions in advance, I did have an opportunity to think about those a little bit, so it helped me be, I hope, more valuable in terms of the feedback that I gave you in this one hour that we had. If you think of anything as you´re going through the video or anything you want to ask me don´t hesitate, just reach out, you could send me any questions you have by email or if you need to schedule more time I´m happy to do that in any way that will help. Good luck!
Researcher: Thank you very much and have a nice day.
Interviewee A: You too [researcher´s name], stay safe!

3.2 Interviewee B

Researcher: I would like to start by asking how you would describe the [ION]?
Interviewee B: I think the [ION] is a great invention from my perspective. There are few points why I see it as a great invention. The first one is (that) [organization´s name] has a large, globalized environment. It has 20 [subsidiaries] globally in different countries, so how can we bring these 20 [subsidiaries] together, you know, the collaboration among these different [subsidiaries] in different countries, so that´s why we need that organization like the [ION], to drive this collaboration, to [not understandable] [ION] future, to bring the [subsidiaries] together, otherwise this would be a disaster if each one works alone and that´s the first point I want to say.
Second, I believe in the synergy effect to bring [subsidiaries] together is huge…if you put the [subsidiaries] together to drive innovations this is great than the sum of the parts. This is also a philosophy here in [location], if you have, let´s say that you bring 10 people together in one team the power is bigger compared to single individuals doing their job. The same here, you have 20 [subsidiaries], if you bring them together, the collaboration, the synergy effect is huge. That´s why we need the [ION]. Of course, we have other topics that we discuss: How we increase inclusion, diversity, how can create a culture that is more… foster the spirit of innovation. So, this is another aspect, our cultural aspect, mind-set, the spirit to work together to foster innovation.
Researcher: So, you mean that with a major diversity it is possible to increase innovation?
Interviewee B: Yes. We believe in inclusion and diversity, and this is the source of innovation. Recently I have published a kind of statement in [organization´s name] internal [journal] because we have this program [program´s name] at [organization´s name], so this is a program that is running. By this program usually they select top leaders to give some statements and one the statements that I gave is: "Diversity and inclusion is the source of innovation and creativity". We need at the [ION] to have a much wider, broader diversity, not only regarding the gender but also regarding age, education, different cultures, from different countries, so that´s the diversity that we are considering.
Researcher: Ok. Thank you. Which goal does the [ION] pursue?
Interviewee B: I think it is what I previously say before. Basically, the [ION] has as objective to bring the [subsidiaries] together, to let [ION] works together, to create one [ION] even if we are different, in different countries. Also, the sharing of best practices, it is very important. Different [subsidiaries] have

different areas of business because we are diverse, but how can we learn together and that´s our objective. Second objective is to foster cross-countries cross-[subsidiaries] collaboration and innovations, create an innovation spirit, create a culture. And the first objective from my perspective is to create a best workplace, a workplace where our employees, our developers, our innovators love working. Therefore, we put a lot of efforts to create the so-called best workplace. Innovation eco-system to enable our [employees] to access to the market, to the customers, to universities and to the different associations and to start up. This is what I call enabling that innovation eco-system. Last but not least talents. Talents are very important. We need very good local brand here in the country where we are sitting. For example, in [city] we have a lot of programs here to foster a kind of spirit to open to the students, to the young talents. We invite them to come to the [subsidiary], we have so called open days at [subsidiary] for the students, who come here to discuss with us. We have also internship programs, vocational training programs and we invite them to come to us. We have innovation days. We have students coming to [subsidiary] to work with our colleagues. On the topic we define for example some topics regarding social issues, whatever solutions they come up. With this engagement we want to build a brand and with an employee brand we want to attract the best talents. That´s the job we do here. Basically I´ll summarize in 5 parts, of course there are more, but these are our main job.

Researcher: Ok. Thank you very much. And what kind of information do you exchange during the meetings with your colleagues of the [ION]?

Interviewee B: This is pretty much around these 5 grow objectives, depends on topics. For example, last week we discuss about what is the new challenges coming after the post covid-19. We have some thoughts in [city], on the way we are working, on the way we are living, on the way we are creating innovations and we need to find solutions. These are the hot topics that we discussed but regularly sharing of best practices, for example how we [not understandable] customer innovation, how we open our [subsidiaries] more to the market and how to attract people, attracting customer to come to us. Maybe I will show you once you are here (?), maybe we´re doing only here in [location]: We have experience centre. It is a kind of show case with the leaders of innovation, and we put together very modern show case and the customer coming to [organization´s name] they can feel, they can touch, they can exchange with the device. Usually if you come to some location of [organization´s name] you actually see a power point, they just show you a power point with [organization´s name] solutions, but it is not possible for customer to touch. We have a lot of studies with physical device, for example different machines in the area of the industry 4.0, and we have a quite large physical device in our show centre to show to costumer. [Not understandable]. I would say that´s not the objective of [ION] but we feel that´s necessary. I am personally driving this project very very popular in [location]. Before the Covid 19 we had costumer coming to us. The number of customers coming to [location] is increasing dramatically. This week we had a large event, usually we do in [another location] but this year [not understandable]. So (returning back to the question) when we have an innovation, we need to find a way to make this innovation more visible to the costumer.

Researcher: Ok. Thank you! It sounds really interesting. But in which way do you think that this exchange with your colleagues could be useful for your [location]?

Interviewee B: Well, in many ways to exchange. We have an official channel, official structure, the medium to exchange some best practices they bring in the media to share. We have also "outset" media, when we come together. Of course, this year we´ll not able to come together because of the covid-19, but usually we come together also to share physically face to face. We have [subsidiary-to-subsidiary] connection, dot to dot connection. Some [subsidiaries] fell they need, they are on the stage, they want to do something and then they found out that some [subsidiaries] have done (what other subsidiaries are looking for) so they connect together.

Researcher: So, do you think that the most important part of this exchange is the connection among MDs?

Interviewee B: Yes, the connection is very important. For example, I have connection with the MD of [another location]. She came to me, and we discussed. We try to exchange. That is the dot-to-dot connection but formal. That really depends.

Researcher: Ok. And have you ever applied some innovation or simply tips and tricks that you got from these meetings?

Interviewee B: Yeah, we do. When we learn some best practices from another [subsidiary] then we adopt that. Why not? If it is something good, we´ll take these ideas, we will localize this because each context has some special specifics, then we localize this program in [location]. Actually, [subsidiary in the location] exports a lot of ideas to other [subsidiaries]. Just to give you an information, if you look at the four big [subsidiaries]: [Location of interviewee B], [another location], [another location] and [another location] they are the four big [subsidiaries]. If you look to the main KPIs, 15 KPIs measurement (Key performance Indicator) we are the number one in all 15, regardless innovation, customer, market, research, employee engagement, leadership, whatever, so we export a lot of ideas, but we pick also idea from some other [subsidiaries], from different [subsidiaries].

Researcher: And could you give me an example of an idea that you have imported or also exported?

Interviewee B: Yeah, for example, we start the innovation eco-system, we were the first one to drive innovation eco-system and for the innovation eco-system we define four main pillars: The first pillar is government association, we have a lot of associations. The second pillar is costumer, third pillar is partner, we work together with our partners to make things happenings, the fourth pillar is start up and the last one is the university. This is the innovation eco-system we define here in [location] mainly to the business here, so later on we export this concept to the [ION] and now it is becoming a kind of standard. That´s one example. Another example here in 2014 we studied a kind of digital [subsidiaries], (…) [subsidiaries] more digitally, we needed to transform ourselves and we studied this project and that became an initiative also in other countries.

Researcher: Ok. Thank you. And for what concerns the idea that you have imported, how have you applied them? So, I mean which mechanism, structure, strategy, whatever have you followed or used to apply these ideas?

Interviewee B: When we realize some [subsidiaries] are doing some good things, sometimes some [subsidiaries] define really good programs for talents, then we look these programs but then we localize. We cannot just take over, we need to realize what is the main highlight, main clue point, main key element of this program and then we adopt. In terms of procedures, processes and also in term of contents we localize.

Researcher: Ok. And in general, in what way do you believe this network impacts on the innovative capabilities of [the subsidiary of interviewee B]?

Interviewee B: Can you repeat please, I cannot catch up you.

Researcher: Ok. So, in what way do you believe that the network impacts on the innovative capabilities of the [ION]. I mean [the subsidiary of interviewee B] has a lot of innovations. Do you think that there is a connection with the [ION]? I mean that [the subsidiary of interviewee B] is so innovative because there is a connection with [ION]?

Interviewee B: For sure, this connection is there. As I mentioned earlier, one of the objectives of the [ION] is drive innovation. Each [subsidiary] thinks how they drive innovation, how they can concrete innovation. Innovation does not come to anywhere, you need first a kind of mind-set, you need also a kind of culture to enable innovation and then you need the right skills and right talents. So, if all this come together, then you can drive innovation. Our innovation eco-system that I mentioned earlier, this is all these four points that come together then innovation will fly on. We, as MD, our job is to create a kind of innovation environment, the inclusive mind-set, the right people with the right talents and a very good innovation eco-system and an innovation culture. All these four parts come together, and the innovation comes, so that´s our job.

Researcher: Ok. Thank you. [Organization´s name] as a whole has a strategy but at the same time each location has its own peculiarities. In what way does this network help you to manage the challenges and opportunities of your specific location?

Interviewee B: That´s a very good question. As I mentioned earlier [organization´s name] has a large [ION] with 20 [subsidiaries] globally and this brings a lot of diversity. With diversity, as discussed, come with innovation and that is the good point. But each set up has its challenges side. Globalization…We know what happens around the world, we can drive much better innovations but the challenges for us is how to maintain these global [subsidiaries] more productive, more effectively, more collaborative. So that challenge we have. As I said we are lucky to have this [ION] and this help us to bring all the [subsidiaries] together, to drive the [subsidiaries] more or less in the same direction. That is a challenge. We come in the real life, daily life, we need to be aware. Let's see for example colleagues in [location] working with colleagues in [another location], or [another location] or [another location], all we need is to bring our colleagues aware that there are differences, there is different understandings, different work stiles. We need to make them aware of these differences not only through education training sessions but also with real examples. Because we believe in diversity, we want to keep this collaborative, does not matter what the gender, culture. That is something we have to deal with, but the benefit we gain is huge.

Researcher: Ok. Thank you. Now I would like to go a little bit deeper in order to understand the dynamics in the network. Which role do different values play in the achievement of the network goals?

Interviewee B: I think that is a very important fundamental of us. Each company has its success, each company has its DNA. We really need to grow this DNA associate with [organization´s name]. As I said, we believe in innovations, we believe in our engineers, we believe in the customer experience, and we believe also in the diversity. These things we need to put as part of part to the DNA.

Especially you came to the point of diversity, these kinds of values are really important for us, as I discussed earlier with you, because we believe that with diversity we have more changes, possibilities to have creativity, and if there is more creativity there is more innovation. So that´s the logic we have.
Researcher: Ok. And for what concerns your personal view, as person not as a member of [organization´s name], how do you evaluate the diversity in terms of perspectives and values that exist within this network? Your personal perspective.
Interviewee B: So, I think we have, I think that one of the most diverse team is in the [ION]. The reason is why our [subsidiaries] are in 20 countries and we have MD from different countries, with different perspectives, with different backgrounds, educational backgrounds, working experience background. That kind of diverse perspectives enriches life, enriches also the organization.
Researcher: So, do you evaluate positively? Do you think that that´s something positive?
Interviewee B: Very positively, yeah.
Researcher: And are you able to identify one or more common points in terms of values among all MDs?
Interviewee B: Many, I think. For example, we take care of people because people are our most valuable asset. Just to give you an example in the Covid-19 in [location] the first priority is the safety of employees, second, the support each other. So, we really make people as our first priority. So later on, when this virus spread around the people and countries we experience, the MD in different countries take the people as the first priority. So that is the first common point, not only because people are the most valuable asset but also because it is part of the [organization´s name] DNA. Second common point, we focus on talents, we need to make our employees a talented employee. It does not matter if they are young or whether they are already long with [organization’s name]. Third common, point is we are costumer oriented, we do have, I mentioned many examples of [subsidiary of interviewee B], we do have the digital experience centre, we have a program which we use to enable our colleagues to [not really understandable, but do something with costumer], we have open days at [location], so many of these [examples]. We are more costumer oriented to have really a kind of connection to the costumers. This is a common point.
Researcher: So, the common points would be: People are the first priority, focus on talents and costumer oriented? So, do you think that all MDs have these values, these commonalities, these common points?

Interviewee B: Yes. Maybe one focuses more on one point, but I think someone maybe feel, maybe not (?) but the majority of the MDs has this focus. Of course, we have the talents focus we do have behind it innovation. Many MDs have also innovation focus.

Researcher: But do you think that at the same time there is a need of adaptation of these values at the local level?

Interviewee B: I would say…it is not a top-down approach. That's not something gives by top leaders, this is part of [organization´s name] DNA. I believe that as MD you must also bring this awareness that is not only with you but also bring the awareness to the employees. I personally believe it is not something top down, that is not a kind of objective that I give to you as MD, this is a kind of automatically response, or behaviour of MDs to drive these kinds of values.

Researcher: And do you think that for example the value "People are the first priority" has the same meaning for all MDs?

Interviewee B: People are different, right? If I say that all have the same meaning maybe it´s not true, but we see most MDs take these very seriously, because we could feel, especially for the Covid-19 response, we could feel MDs really put people in the first place, in the first priority. Regarding the degree, maybe one MDs put this as top priority, maybe another one considers also other aspect. That could happen, but I would say most MDs, all MDs I think they put people as first priority.

Researcher: Ok. Thank you. Now I would like to talk about competences. Which kind of competences do you believe a MD should have in order to able to act with diversity in this context? So which competences to act with diversity.

Interviewee B: This is a very good question. First a core competence of a MDs to do this job you need a really clear strategy, and we need be able to guide the organization where you want to go. Of course, [organization´s name] culture (…), that´s no doubt, but when it comes to the local execution you need a clear direction, where your [subsidiary] wants to be in 3 or 5 years. And you need also to be an influential leader. So that is maybe a key word for you, you need to be able to influence people to work together through a direction. This is a very important competence. Very clear strategy, then an influential leader, third you need to be able to put them together, otherwise the team will not follow you. If you have these first points people will follow you. So, these are the three points that I would say that are very important. Of course, I can mention other ten points but if you are a top leader, I think these the more important.

Researcher: And which skills and characteristics someone should have to be an influential leader?
Interviewee B: So, I think it is very important skill to have a clear (integration?) to the values you stand for. And also, a kind of skills to see a real imagine behind the colour. In [location] usually there is a word: If you see a lots of issues are surface but you do not really see what is behind, this means you need see the [not understandable] is behind, you need an ability to see through that and to find out these really issues, these really cause and I think this is a kind of skill that you need as a leader. Work experience, strategic thinking, analytical thinking, that all come together. You need also to be able to speak the languages of other people, you need to understand what they think, how they think and to try to speak the language they speak, try to think what they think and try to abstract the issue that they have and analyse the issue that they have. Common issues, right, you cannot work on individual issues, this is not the solution.
Researcher: So also, communication is an important skill.
Interviewee B: Yeah, communication is very important, because as I mentioned already with communication we cannot [not understandable] what you stand for, but can also communicate feedback from IB people to developer, how they think, how they act, what they usually do. But very important here we need a kind of skills, maybe that´s another one more, because personally for example I come out very oft, I receive here every week costumers to discuss with CO, CEO and you need to be able to discuss with senior leaders. To go out and have a public speech. Before Covid-19 I think every week a delivery one public speech, a kind of employee brand, innovation leader, to let the market know you are leading in some areas.
If you ask for skills there are many other skills, for example you need to behave with the government. In [location] it is very important. Around us there are a quite a lot of government, they are supportive, but you need also to understand their needs, they have their KPI, we have our KPI, how can we build a bridge to work together, because without government approval in [location] it is very tough, very challenging. Then also the skills to work within the innovation eco-system as I mentioned earlier, with our partners, with our customers and with young talents. That´s always depends on what you need, sometimes you need to speak to young students with their logic, because you cannot just bring a lot of complex business studies to them, they will not understand. And then we need to speak to the costumers. Last week I delivered a lecture to the [name] university, which is one of the more famous universities in [country], there is also a lot of German culture behind, so I delivered them a two-hour bachelor

session, and you need to customize your lecture in a way the students are interested in. If you need to speak with a CEO you need to be able to discuss also with CEO in their languages. What I want to say is that depends on what you need. You need to behave properly, to adapt yourself to speak a language that your audience could understand.

Researcher: Ok. And thinking about the future, how do you think these competences could be developed?

Interviewee B: I do not believe in the trainings. I have never had this kind of trainings. You need encouragement, to encourage yourself, to leave your comfort zone, to take new challenges, to do the job you need your skills already. The skills I mentioned to you earlier is not something that come with you, but they grow with you. Maybe sometimes you hear something, you know how to do, but I do not think that that can come from any training. Training maybe gives you a starting point, put you in the start.

Researcher: Ok. Thank you. Now I would like to turn from the network to your professional relationship with individual colleagues from other [subsidiaries]. Aside from the institutional meetings in the context of the [ION], are you in contact with other MDs on a regular basis, so via email, call, face to face, it´s not important (the medium).

Interviewee B: As I mentioned earlier, we do not have this form, regularly meeting from dot to dot, to MD to MD. Regards connecting (because of) some issues…not issues, but something that we want to check with other [subsidiaries]. For example, about carriers we ask what is happing in [another subsidiary] for example. We try to connect on the needed basis I would say, not really just because a meeting, that´s not what we are used to because we have official meetings through [ION], and rather informal meetings depends on what we need.

Researcher: And with whom specially do you speak?

Interviewee B: It depends on the reason. For example, we spoke with [name – MD from another subsidiary] just two days ago. She came to me, she wanted to have an understand how I manage [the subsidiary of interviewee B] because she is a new MD. She is new, she wanted to understand and then we had a meeting. Also, on needs basis, right? Sometimes we have a meeting regarding talents. This really depend. This is not really formal meetings.

Researcher: With everyone, with every single [subsidiary]?

Interviewee B: Depends. If I want to understand, for example, what is happening in [another location], then I will write an email to [this other location]. For example, the MD from [another location] wrote me an email last year about some

costumers in [country] and wanted to have some solutions which we have built here and then we connected together.
Researcher: So, it depends on the topic?
Interviewee B: Depends on the real need.
Researcher: Ok. A last question: I know that there is a value at [organization´s name]: "build bridges not silos". In your opinion, what is your interpretation, what does "build bridges not silos mean for you?
Interviewee B: That is exactly our job. [ION] is cross [organization´s name] board functions. [organization´s name] is a board area, board area from MD, board area for technology, board area for HR, so [organization´s name] organizes vertically, but [ION] is horizontal. We are doing horizontally. We break these silos and bring people horizontally together.

3.3 Interviewee C

Researcher: I´d like to start by asking you how you would describe the [ION].
Interviewee C: Yeah, the [ION] comprises 20 [subsidiaries] across the globe. So, we have R&D centres, research and development centres which we call [subsidiaries]. But it is also a combination of not only R&D, you know, line of business, but also services and support businesses, development teams, co-innovation are topics that we handle on [subsidiaries]. So, basically [organization´s name] has a very distributive way of development. Within the [ION] we are giving an empowerment for these different [subsidiaries], to function as a start-up and at the same time, the empowerment for them to drive the location strategy, but at the same time contribute to the overall development strategy of [organization´s name] as a company. Most of the solution that we create from [organization´s name], I would say around the majority of the development work is happening in one or the other [subsidiaries], which is part of the network and, from the [subsidiaries] we also align very close to [not understandable] like, you know, the connection with the universities, the connection with the experts from the you know, the schools, like teachers, you know, professors, students. So there´s a lot of work and at the start-up eco-system outside, you know, so this is something that we foster at the [ION].
Researcher: Okay and which goal does the [ION] pursue?
Interviewee C: So, we have many goals. One is basically to support the global strategy of the company. And we also have the locations´ strategy, for example [subsidiary in the location in which interviewee C is MD], we are a market

focused [subsidiary] and we specifically focus on things that are required for the [location] market. So, we focus on the regional aspects there. The other goal includes an environment where the employees have a very…We create a great place to work. Then we also focus on regional market, and this is very important for us, and then some global development happens. So, there are different [subsidiaries], you know, for example [another location], [another location], [another location] they are all hubs. They fundamentally do a lot of global development from these [subsidiaries] and they have huge development workforce, employees part of these [subsidiaries], you know, for example in [another location] they have 15.000 plus employees, in [another location] maybe plus to 10,000, [another location] and [another location] maybe somewhere between 4.000 to 5.000 people in these [subsidiaries]. And then we have technology focused [subsidiaries], [subsidiaries] which are focused on a particular technology. For example, some [subsidiaries] may be focus heavily on [topic], [topic] and organizations aspects, so they are technology focused [subsidiaries]. And there are [subsidiaries] which are application focused, so they may be focused on one or another application. And then there is the fourth category, which like [subsidiary of interviewee C] and [subsidiary] commonwealth of independent states, which is [location]. The [subsidiary] in [country], they basically are called market focused [subsidiaries], so they exist in order to sell to local market. In [location]´s case, we serve the [location] continent, that means all the countries, the requirement, legal requirement. So, these are focused area, so market focused [subsidiaries]. So, I mean in a nutshell I´d say, you know, it´s a combination of all these areas that we focus on at the [ION].

Researcher: Okay, thank you. And you talked about the global strategy and local strategy. How do you implement the global strategy of [organization´s name] as whole in your local environmental, so at [location]?

Interviewee C: Yeah, so we have a cascading strategy. So, what strategy is defined, of course the strategy is defined based on discussion which are from the executive level, at the same time collecting in what´s from the [profession] and [profession] in our company. So, it is top-down and bottom-up approach…Confrontation that we have in order to define our strategy. And once that´s done there are several cascading meetings from this board to the next level, one level, two level…. So, there would be a specific approach to roll out the global strategy to the [ION] and then into each [subsidiary]. So, my role as MD also basically… give me a second, one second.

Researcher: Okay.

Interviewee C: I just had to open the…
Researcher: Ok, no problem.
Interviewee C: Everybody is working from house, home schooling from home. So sometimes we have to go to shopping malls to buy something.
Researcher: I can totally understand it because we have a similar situation here.
Interviewee C: Yeah! So, from a cascading perspective this is what we do, we basically, you know, share this strategy from the [ION] to every [subsidiary] and then, me as an MD, I have meetings with my leadership team where I explain the strategy to them and we have discussions and then we also share this in team meetings, all hands meetings where the strategy is further cascade to the work force.
Researcher: Thank you very much. So, coming back to the [ION]. What kind of information do you exchange during the meetings in the context of the [ION]? So, with your colleagues of other [subsidiaries]?
Interviewee C: We mainly share important strategy that we take from a global perspective, so the approaches that we have to take from business perspective, from HR perspective. So, this is, you know, meeting where we leaders come together and we discuss the decisions, if there is any clarification required. So, it is an interaction forum, at the same time we also, you know, take sometimes for clarifications, so we have any clarification on HR topic, or there are some decisions made which we need to know to implement, so this is a forum to discuss that. There we also have experts speaking to us in such meetings, so people from expert areas, so they come and discuss with us what is the strategy from their line-of-business and how this impacts the network and, you know, why that strategic decision is being made. So, experts come, so they come from different expert areas, come and share their opinions and there´s a high-level discussion there. And then the third part is for us to bring the best practices that we have from different [subsidiaries], so what are the other [subsidiaries], for example, doing during Covid time. There are different activities that the different [subsidiaries] were doing in order to support our eco-system, to go through this difficult time. So, we come together and share those best practices and innovations that we have from our different [subsidiaries]. So, it´s basically a combination of topics that we take up during such meetings.
Researcher: Yeah, you talked about best practices. Have you ever applied some best practices, some innovations, or simply tips and tricks that you got from these meetings?
Interviewee C: Yeah, several times. Can you hear me?
Researcher: Yeah, I can hear you.

Interviewee C: So, we implement such best practices. I mean, some things make sense to be implemented in a particular region and in the [subsidiary], but some things require some adaptations and this is something that the [subsidiaries] evaluate, you know, this is a global best practice that can be implemented in all locations or we need some regional adaptations or this is something that just makes sense for my [subsidiary] or my region. So, this is carefully evaluated that we make before we implement best practices.
Researcher: And could you give me an example? Also how do you…. How the [ION] does regional adaptations?
Interviewee C: Yeah, so for example, during Covid, globally [organization´s name] decided, our company decided that we will make [name] platforms. It is a supply platform, supply chain platform that [organization´s name] has, and we decided that we´ll make this available for anybody to use, free of charge, you know, during the time of Covid, and this is a global best practice that we decided that we will be implementing in all locations. So, from my [subsidiary] here we basically did several [not understandable] for people to use the platform. Then, this is a global strategy that we adapted to, or we made available to companies from our regions here. On the contrary, there is something that we innovated from our [subsidiary]. So we created [product] that basically was created in order to support NGOs, the doctors and patients in [country] to cope with this challenge during the Covid times, where going to a doctor may not be that safe for the doctor or the patient if it is not a covid related, if it is another disease which is not urgent to be immediately treated by a face to face meeting with the doctor. So, this [product] can be used to have face to face confrontation, sorry I mean remote confrontation, we called it the [name of the product], and this was made available by [subsidiary of interviewee C]. [Researcher´s name], I may lose the connection for a few minutes.
Researcher: Okay.
Interviewee C: Can I call you back? Because I am going into my car parking.
Researcher: Okay.
Interviewee C: I am backing in a few minutes.
Researcher: Ok!
After some minutes:
Researcher: Can you hear me?
Interviewee C: I can hear you.
Researcher: Now I would like to ask you…
Interviewee C: Sorry about the interruption.
Researcher: No problem, really no problem.

Interviewee C: There was not network there.
Researcher: Okay, no problem. I don´t know if you want to add something because you were talking, I do not know if you want to add something or if your answer was already done
Interviewee C: Yeah, I was talking about the [product], with which we can make remote consultation with the doctors. So, this is a best practice that we shared with the other [subsidiaries] as well in the [ION][67]call and the other countries, who are interested. We also mentioned that you have to check what is legally possible in your geography and some countries were interested, like [country], so they were interested in using there, but then they have to make country specific adaptation, the legal, making the infrastructure available in that geography because there the patients are from [country] and they have that country regulation, security, IT security policies, etc. So, they have to adapt accordingly. I mean we cannot have one solution, you know, simply plug and play in any different geographies. So, we have to go through all these checks and adaptations before we can implement something, and for some countries they don´t see a necessity of this. So, when we share a best practice each [subsidiary] makes accordingly, what they would like to adapt, what they would like not to go ahead.
Researcher: Ok. Clear. And in which way do you think that this exchange with your colleagues could be useful for your [subsidiary]?
Interviewee C: No, I mean, we always foster an environment of collaboration. So, you know, when we share this knowledge, so we also get some questions, topics, etc, you know, so feedback from other [subsidiaries]. So, maybe we are missing one of the other points. So, this consultation helps us to think broadly. So, in case there is something that we are missing, so then those kind of discussion helps us to ensure that there is no part which is being missed out or not considered, and at the same time, you know, it´s an opportunity for our leaders to showcase what we do from an innovation point of view, from our region to the rest of the globe. So, it´s something you know, we´re making globally innovation available locally at the same time local innovation, which we make available globally.
Researcher: Ok. Thank you. And in general, in what way do you believe that this network impacts on the innovative capabilities of the [ION] generally speaking, but also [subsidiary of interview C]?

[67] Interviewee C is referring to the regular calls of ION.

Interviewee C: This collaboration… we have distributed development, as I mentioned it in the beginning. So, when we develop a solution a part of the product would be developed in one location and another part could be in another location, so there have to be a high level of teamwork, that needs to be put in place. So, the [ION] helps to bringing these teams and leaders together and work for a common purpose, and at the same time sharing our challenges, and also, as I previously mentioned the sharing of the best practices. So, the [ION] is a platform where this kind of discussion happens very freely, and we foster a very high level of innovation spirit there. The cultural understanding, we have 20 different [subsidiaries] in maybe 16 different countries. So, there is a lot of cultural learning that we have. The way that the people from [another location] sees a topic from a cultural standpoint might be different from what we see from [location of interviewee C] or from [another location]. So, the [ION] plays that role to have people and cultural integration as well.
Researcher: And how would you define cultural learning?
Interviewee C: Yeah, so when you look at the culture made by the people of the organization, right? There are so many different factors which constitute a culture, right? That could be languages, that could be history, that could be geography, that could be beliefs, so many different factors constitute the culture. And then, what we do from the [ION] perspective is that we have this platform where people can come and integrate. And we create an environment which is really creative and that is only possible when we have that diverse beliefs, cultures coming together, and everybody is inclusive in a company. So, this is what the [ION] do. We foster diversity and inclusion and then we connect all these different cultures into a same platform. Whereby we fully leverage the strength of all the different origins and people.
Researcher: Okay. I am the really interested in this topic. So, I´d like to go a little bit deeper. How does this integration and this connection among cultures occur?
Interviewee C: Yeah, you know, many things that we need to have as key principles in order to drive for, you know, integrate the cultures. So, one is trust and transparency and believe in the diverse capabilities that the organization has. And then a very strong [not understandable] includes everybody in the overall strategy. So, we, from the [ION], we foster that. We have dedicated programs for culture, and part of this culture programs we have several aspects that we drive. For example, we have a common culture that we have for the [profession] team and that is based on certain principles like dedication, commitment and craftmanship and so we run that development [profession] culture. We call it

[name of the program], so it is based on three principles: Craftmanship, commitment and dedication. And here, a part of this culture program, we also have ambassadors, we call the [name of an initiative]. So, we have culture ambassadors in all the different [subsidiaries], and they are people who are ambassadors of our strategy. There are people coming from diverse backgrounds, gender, diversity, all the diverse backgrounds that we can think about and then the [name of an initiative] is something that the [ION] fosters to drive this cultural discussion. How we build the program where the [profession] culture been cascading. Then, on top of that, we have regular meetings when it comes from people and culture. From a board area perspective, we have an executive sponsoring from our board area, specifically for people and culture. We are part of those programs as well, which mainly drive the common belief and common culture for the development board area. So, several aspects are there, part of the culture program that we run at the [ION].

Researcher: And why is diversity so important for the [ION] and for each [subsidiary] as well?

Interviewee C: Yeah, I mean, you know, it´s mainly… We have to understand each other, you know, so this is the most important thing. So, people from… you might be from a certain region, speaking a certain language, having a certain belief. In order to understand you and foster a very collaborative environment, you know, I have to be open, I have to be respecting the diversity that you bring into the organization, right? Similarly, from your side also it is required to understand, I mean, it is not only about making big things all the time, but also understanding small things and, you know, this is very important. And then, when we are able to understand people and the diverse frames that they bring, it is much easier, and we would be able to leverage the maximum of the skills and capabilities that each one of us bring to the table. If you don´t foster that, we will be close, we will be in our own silos, there we think that the way we think is the way that has to be and then we lose an opportunity to connect and really take the best of all of us, right?

Researcher: Ok. thank you. Thank you for your explanation. Now I would like to know your personal opinion. So, how do you evaluate diversity in terms of perspectives, values that exist within [ION] and within [the subsidiary of interviewee C]? Now I would like to know your personal perspective.

Interviewee C: Right, yeah. So, my personal perspective, I think that I come from a different country living in [location]. I was born and brought up in [continent], to be specific in [country] and I have travelled a little bit around the world before coming to [location]. I have worked in many countries before coming to [country] in my [sector] career. I have the benefits of this international experience, mainly because it added a lot to my overall learning enrichment of me as a person. Learning from the different cultures, talking to different people, understanding how they think, what are the different values of each system. So, you know, it makes me that much more broad-minded. If I were only living in a small state in one part of [continent], then I will not be knowing the big world around me and how people are, you know, how people are basically, you know, conducting in those regions, what are the details of the cultural aspects there. So, it helps you to grow as a person and at the same time, you know, so this cultural awareness and the respect that I have for different cultures, also helps me to run an organization most diverse fashion, because in [continent in which interviewee C is currently based] for example we have not only [nationality] even though the [subsidiary] is based in [country]. I have ten different nationalities working in the [subsidiary], may be even more. I have Germans, I have Peruvian, I have Argentinian, I have Colombians, Mexicans, then Austrians, so you know, I have many different nationalities working and when I´m going to the other factors, like the generations, I have five different Generations working in the [subsidiary]. People that are in the teens, who is an intern within the company going to the college. Then I have the early talents in the twenties, then a little more experienced people with 30 years plus, then very experienced people 40 years plus, and then very very experienced, long wised men from the fifties. So, that is another diverse platform that we have in the [subsidiary]. And then we look at people from different abilities, for example [not understandable] diversity. They also bring their capabilities that are needed for a development environment, for a development [subsidiary]. So, my experience, you know, working in different geographies, interacting with people from different work of life in different cultures also helps me to be broad-minded and always thinking: "How can we leverage? how can I take the best from the capabilities of these people and contribute back to the company and to other eco-systems?" I don´t normally think a very narrow-minded, because I see a possibility, and I think that that learning came to me because of my experience with different cultures. This is something that helps you grow as a person, and which can be used in your professional life as well for the benefit of the community as well as for your organization.

Researcher: And how to foster this learning within the organization? For example, I know [name][68]. She´s part of [organization´s name] and I want that she should be able to have all these competences, to go through this learning process. As MD, what should you do in order to foster this learning for [name], for example, or for X or Y?
Interviewee C: For this learning we have different venues, you know. So, we have the leadership talks, so I can share my experience with my colleagues and similarly the leaders who are sitting in the [subsidiary] we also get this opportunity to listen to those leaders coming from different geographies. For example, if a [nationality] come, a [nationality] come, we get this opportunity to get insights from their experiences, so the sharing happens. Then we also discuss such topics in our leadership team meetings, all hands meeting, etc. And then, as a person, I am also keen to give speeches, so just like the way I spoke in your university, [university´s name], a couple of years back in the [conference] where I shared my experience from [location]. Similarly, I do take the opportunity if I have to speak to a university, I take it gladly. And I do that it very often as well. When I am in [country], last time when I was on my vacation, I got invited by my alma maters where I did my 11th and 12th grade. This university is one of the oldest universities in [country].
Researcher: [Interviewee C´s name], I cannot hear you.
Interviewee C: Can you hear me?
Researcher: Yeah, now I can hear you.
Interviewee C: So, I shared my experience in this university that I studied two years, and this is one of the most prestigious and oldest university. There were a lot of students there, it was MBA students. And similarly, I do that in many universities. This is one way that we share our experiences, listen from them, learn from them and then we get, similarly, the opportunity to listen to some other leaders. For example, I got the opportunity to learn from several leaders when I visited [university name], right? So, it is a network impact, as you share your knowledge billings this, this is what I strong believe.
Researcher: And apart from diversity and different perspectives, are you able also to find common points? for example among al managing directors, for example?
Interviewee C: Absolutely, there are many common points. Each one of us is different in our own individuality, but there are many areas where we have

[68] Name of an employee that the researcher knows was working for interviewee C in the time of the interview. The name was used to push interviewee C to give a concrete example.

common goals, which are innovation, then people engagement. There are many common grounds. I find all my peers very people oriented, you know the directors, and then highly involved in innovation aspects, in there the [subsidiaries] foster innovation, and highly interactive with the eco-system. So, there are many common factors with the MDs, very approachable people. This is what I find very nice working with my peers. So, there are many similarities and at the same time we also do not want to only whereupon similarities, there have to be different opinions, there have to be different ways of thinking, and this is how we progress to the next level, right? If we were homogeneous society, then we´d all think in one direction, so that may be counterproductive. So, this is where we need to have that diverse thinkers, people from diverse backgrounds, people who challenge you, your point of view. So, then you take the sum of it and then, you know, the [ION] moto itself is the famous Aristotelian quote: The whole is bigger than the sum of its parts.
Researcher: Exactly, I totally agree. Talking about competences. So, what kind of competences do you believe that a managing director should have in order to be able to act with diversity in this context?
Interviewee C: I think that the basic thing that a [subsidiary] director to act in a very diverse space is respect. That is the fundamental thing. We have to be respectful, we have to respect other cultures, we have to respect diversity, then there is a cascading impact.
Researcher: Are you able also to identify other competences or skills or do you think that respect is enough?
Interviewee C: No, there are so many things. The main thing that I see, you know, is respect but then there are so many other things that, you know, if you want to foster an environment of diversity that you have to, you know, you have to practice. One is transparency, so this is very important, and then giving opportunity for people and having this platform for everybody to integrate easily is very very important for a diverse environment. And discussion, this is very important, respectful discussions, coming back to respect. If you want to have diversity fostered, it is very important that people learn from each other and that they understand what capabilities or strength that each person bring on to the gain. This is very important if you want to have diverse organization. So, people who are in the teams of 20, of 30 they all have something to contribute, and they all bring key capabilities. The capabilities that a fifty-year-old bring to the organization is not what a teen or 20 years would bring to the team. So, these are all mutually complementing, and we have to be open, and we have to be

welcoming of all such talents and skills in order to foster the diverse environment.

Researcher: And how to develop this kind of competencies?

Interviewee C: Sorry, again please.

Researcher: How do you think that these competencies, skills, so for example respectful, transparency, giving the opportunity to people, etc, how these competences could be developed in one person and also in the organization as a whole?

Interviewee C: Its more education, awareness creation and practice, you know, so this is very important and the sharing of experience, listening to experts, then making people aware, or showing them showcasing. What are the advantages of being a diverse environment? So that all foster much more creative and diverse space. So, a combination of factors again. We cannot say one of the other is just enough to foster in one man like that. So, we have to work on the topic, it is very important. Speech itself is not enough but it has to be substantiated with actions as well. If you believe in diversity, you have to make those actions which support diversity. I can now speak hundred times about transparency, but if I do not refine myself as a transparent person… It is reflected very easily, it is only a lip service and then there´s nothing more about that, so then people will automatically come to a decision that this is all marketing speech or fake speech, you know? That is very, you have to substantial your speech with actions supporting diversity.

Researcher: Okay, thank you very much. So, in this last part I would like to turn from the network to your personal and professional relationship with individual colleagues in the [ION]. Aside from these institutional meetings in context of the [ION], are you in contact with other managing directors on a regular basis? So, via email, call face to face, the medium is not important and, if yes with whom and how often?

Interviewee C: Yeah, I mean, on a need basis, you know, so I mean, of course we all come together every two weeks in the [ION meeting]. Apart from that, maybe a few of us comes together on different events, etc. Then we meet at least once or twice for our outside meeting. Sometimes one time in person, sometimes the second time virtually. This year due to Covid it's all going to be virtual. So, we have different ways that we interact with each other, of course via emails on a demand base we also interact with each other. So, these are some of the touch points that I have with my peers.

Researcher: Okay, so is there anyone that is a special, let´s say, in this network?

Interviewee C: No, all are specials! (laugh). All of them are equally important. Sometimes, you know, we get too involved with some MDs more frequently maybe on a project, so then you have more regular interactions with them than the others.
Researcher: And does this interaction with your colleagues help you to manage also challenges and opportunities of your specific location?
Interviewee C: Absolutely! We can share our challenges, we can ask: "Did you have a similar challenge? How did you overcome that?" Or we have a common point that we want to discuss with all. We are having this challenge or opportunity, they can ask: "How do you say this?" So, we can have a join meeting then of course, you know, this kind of interaction helps us to have a better operation.
Researcher: Thank you very much. A last question. What impact do you think that this network has on the organizational performance?
Interviewee C: So, the organizational performance… We are able to create high-performing teams with the impact of the network, because the network crosses many different lines of business, so we get to know which line of business is doing what, which organization is doing what. A [network] fosters this kind of exchange of information between different department. What do they… people can learn from each other; it helps to promote career options for our employees. So, one person maybe in services can move to support or support can move to development, or development person can move to an operation area, maybe a person can move from university relation. You have seen [Name], she was working in the operations, then moved to an LBO and now she is part of another organization.
Researcher: I did not know.
Interviewee C: So, all of these interactions happening within the [ION], so we can foster career options for people, career development opportunity, learning from each other, jointly evaluating our strength and weakness, going us as a team to help our clients. This is very important because clients might be needing a support on different fronters, from development, from support, legal aspects, so many different ways that clients might require enablement from the [subsidiary]. So, if performing as a one single team benefits our costumer immensely. In the [subsidiary] we have the globalization services. They deliver legal changes to our customers in [continent]. So, [country], there are a lot of legal changes happening every time, so once this delivery or the development is done, there are people in the [subsidiary] who support the solution and then we have the sales team who sales the solution to the customer. So, we act as one single unit

and the [ION] being able to foster all of these units, they are able to have a better solution for our plans in the region and globally.
Researcher: Thank you very much. That´s everything from my side. I don´t know if you have any questions.
Interviewee C: No, I´m sorry for the interruption in the beginning.
Researcher: No problem at all, really no problem. So, thank you very much for your time, thank you very much for all your insights. If you have any questions, please do not hesitate to contact me, you have my email, so please feel free to contact me and thank you once again.

3.4 Interviewee D

Researcher: I would like to start by asking you how you would describe the [ION]?
Interviewee D: The first story I have in my mind if I think on the [ION] is family. It is kind of big family distributed among the world. It is not about physical parents, but we have the same goals, we share very similar values and also in terms of management we do have same KPIs. So, each of the [subsidiaries] MDs, independently on which part of the world we operate in, we have a set of MBOs – Management Business Objectives – which measure our performance as employee and is also relevant for bonus and so on, for career development. We do have let´s say 60% to 70% of our measurable of quality KPIs are the same. This means that, on the one hand, there is a clear guidance, and there is a clear structure what every [subsidiary] has to delivery back to the family. We have quarterly reports, we have bi-weekly calls, we have our new letters, they are published in the same jam group for collaboration, and it is like in the family. So, in one hand each of the [subsidiaries] MDs is quite a senior person, and it is understandable that if you cannot make this week the bi-weekly call then the next week for sure, because maybe we have an important meeting with our clients, obligations, we meet with the government people, but as a family there are rules. In the evening, independently on how important is, father or mother… It is clear get together, they wash the hands, they sit, and they are in a safe environment. This is like here, there are some unwritten rules, culturally driven, that we say: Ok, the setup is we are located in 20 countries all around the world, we are in different time zones, we have our obligations, but guys, you know that supper begins at seven o´clock. So, I know in advance that in two weeks I have this call, where it is not that kind of formal obligation, but I understand that I

should be there, and this is very important. In these calls we share the views, get the agenda centrally prepared, we have our own influences[69]. We can have our topics on the agenda if we think there is something to share globally, it is one point. And also as a big family you are not equally connected to each of your relatives, so to say, and the MDs who are maybe friends, colleagues, or have worked in another department in [organization´s name] previously life and have more trust to each other, had more physical meetings in the past, so they also do have, let´s say, parallel communication channels where for particular issues…I personally talk and email frequently with the [subsidiary] [location] because [name] and I we have been working for the same sort of line business for, in my case, twenty years already and in his case even more. And the MD in [location] [name], when I started he was already more or less in this position and I worked in different units always closed connected to people from [location], so we do have some backgrounds.

On the other hand, it is also important that the [subsidiaries] are not equal in terms of number of people, the relevance for the company. And I would rather call it focus. Among 20 [subsidiaries] we have different flavours and as you mention[70] [another location], the two [subsidiaries], so [another subsidiary] and [interviewee´s D subsidiary], we are partner [subsidiaries] because we do have more or less the same goal, we both are market focused [subsidiaries]. This means that our main objective, compared to other [subsidiaries] in the family, is first of all to support the business growth of the market unit, so the costumer, the revenue growth and in this case there are only two [subsidiaries] worldwide, [another subsidiary] and [Interviewee D´s subsidiary] who are intensively collaborating with the sale organization. And this can be described with three main objectives what does it means being market focused: It means first of all support the operations, escalations, CEO Level meetings with top costumer and use the [subsidiary] as a kind of strategical investment of the corporate into production in these countries, which is very important for [country] and [country], where we cannot come and say: I have a huge market team and the best sales people, we do not produce anything in these countries, but we sell, implement and integrate. This does not work in [country of Interviewee D] this way, if you want to make business in this country you have to have hands in, skin in the game. It is very important to have skin in the game and skin in the game is that we have local production and for the market it is sign of long term

[69]Interviewee D means that every subsidiary has its topics.

[70]Interviewee D is mentioned the researcher´s introduction before starting the interview.

investment of the corporate, because if you have thousand market people or sale people you can collapse with the organization within two days, because you get good sell people, you pay them bonus and then if the business goes down, just let them go, but if you have local production in the [subsidiary], in the country, this means that you invest two years into young talents, into developers, graduates. In the countries where [organization´s name] has [subsidiaries], it is kin in the game, it is foot in the door, it is local production, it is long terms investments in employees. The second point is connection to the local academia, universities and gaining access to the best talents in the country. This is also the topic in [another country]. The guys are even in the campus with the university, it is a big topic to [subsidiary of Interviewee D], we have very strong relations to the universities, we take interns and students and give master thesis to hundreds of people to build a pipeline for new hires, for new talents. And the third point, which is also market orientation, is to connect to the start-up eco-system, to the local partners, to the venture capital institutions, to investors. These are more or less the three points and also in the content side, it is the same in [another location], it is the same in [location of Interviewee D]. We have hundreds of people who develop the so-called globalization, they localize [organization´s name] global products to the local legal requirement, first of all in pay roll and then in finance, accounting and so on.
The other [subsidiaries], the other family members have different flavours, different focus. We have four huge [subsidiaries], like [country], [country], [country], [country]. These four huge [subsidiaries] and huge means more the 3.000 employees in one [subsidiary], these are the development factories, so for the big [subsidiaries] their foci is less to support market growth or start-ups or partners, these are the factories where our [product] is produced and we call them hubs. Usually, the hubs have many products and technology, and it is about global production and distribution, economy of scale and so on. Then we also have [subsidiaries] with very strong technology focus where particular parts of our technological platform are developed. It is [country] with almost 1.000 employees around [product] and [product], the [subsidiary] in [country], they also develop [product] and they have a flavour in [product] and all these […] topics. The [subsidiary] in [country] has also this [product/topic] flavour and then the different [subsidiaries] which are more focused on application, on the real product for end users and these are most of the rest [subsidiaries]. This is how the family is: Market orientation, hubs factories, application focus and technology focus. This means that in the family we also…We are in different regions, but we share the values. That is very important to mention that

[organization´s name] has a quite different strategy regarding the development centre. If you take companies like Microsoft or Google or Amazon, they rather have the model one-two big development centres, the development is centralized and they say…in these big centres, somewhere in California, Google has also something in Switzerland, they attract talents from all around the world because the talents come to Seattle, to California and we get all the cultural flavours and so on. [Organization´s name] says: We have a different model, we have our own art to build the best [product] while remaining close to the market and we attract talents without pushing them to leave their countries and leave their routes. So, we distribute our products, our innovation centres, we spread them all around the world. We look for locations with some conditions. [Organization´s name] sells [product] and makes business in 190 countries but we have only 20 [subsidiaries], so it is not that every market unit has its own small [subsidiary], it is a different story, but still we have a quite good global coverage. So, I think this is more or less high level what how I perceive the [ION].
Researcher: Ok. Thank you very much for your overview. It was very interesting and really useful. I would like to know now which goal does the [ION] pursue? Which is the goal of the [ION]?
Interviewee D: The main objective is to…The [ION] consists of these 20 [subsidiaries], the [subsidiaries] are there for [product] development, support, innovation, co-innovation with partners and start-ups. The [subsidiaries] are not profit centres, they are not selling [product], this is very important, but it is not like that that all the [subsidiaries] have only developers. For instance, in my [subsidiary] we are almost 400 people in locations [city] and [city] and we have employees working for different board areas in the [subsidiary]. So, the [subsidiary] is a kind of umbrella for corporate functions, development, support, partner services and co-innovation with the eco-system. So, the goal is to develop, support, implement, help to run and engage with the eco-system. So not only do everything by ourselves, (but also) help partners to enrich our [products] and to integrate their products with our standards.
Researcher: And what kind of information do you exchange with other MDs during the meetings of the [ION]?
Interviewee D: We have several dimensions. Now in this COVID 19 time for sure COVID 19 is the topics for everybody in every weekly call. On the one hand, there is a global guidance and [organization´s name] global pandemic taskforce. These are the guys at the headquarters who monitor the trends and the number of people in the countries worldwide going up, going down and they provide report data and global guidance on whether we open offices or close

offices. This is the global part. Then every country has a legislation. In [country of interviewee D] there is a labour law which says the employer is obliged to provide work space, physical rooms and infrastructure to every employee and the implication is…Even if we say now: “In [country] there is a lockdown, the office is close because we take care of our people”, we have to follow some local rules and figure out on the local level what are the legal implications, like if someone has to leave the company, they can go to the court and say: “They fired me because of bad performances and so on but they have not fulfilled their obligations, for three months they did not allow me to enter in the office, I could not do my job and now they say I had not a good performance”. This kind of stuff is very local, so the people in [city of the headquarter] they have no chance to know each law of these 20 countries. So, what we actually do is say: “Ok, guys, let us exchange. What are the potential risks, what are the potential implications and what are the results of our employees. Are [employees] very comfortable to work at home and do not want to go to the office at all or do they have sufficient number of people like young people, families that cannot afford large apartments and they really cannot work at home for months”. So, we, first of all, get the global central report and the pandemic view and then we share, as in the family, what is going on my street, in my house and so on. There are some [subsidiaries], like [country], [country], [country] and [country], who already reopen the offices, each one with a kind of different flavours and different tools and these guys make videos and share how it works in [one of the mentioned countries] in the first week. The employees drive with their motorcycle to the office and she or he wants to get there and the social distance, and cleaning. So, the guys share the experience and then myself I have also to write a plan for the office reopening and engage local facilities, local IT, local security, the land lord and cleaning services. So, this is a good example, there are some front runners, they share their experiences, we share our risks and limitations and discuss. The other stories (points of exchange and discussion) there are many global initiatives.

(At this point interviewee D came back to the question): We asked me about the goals and what I told was less about goals, it was about objectives, what the [subsidiaries] do: To develop, to support and so on. The goal is rather to provide the best space for talented people to develop, to support and so on, to attract talents. We are also measured by being the best employer in the country for instance, it is a very important KPI. But we are not obsessed by the KPI, by the number, if we are number one or number two. But this is our culture and mind-set, we should create the culture and comfort to attract talents but also to retain

talents and not only because of monetary benefits but also as the place where the people can evolve, where they can work for long time, where they feel comfortable, safe. This is rather the goal, the other stuffs are the objective, because otherwise without this cultural, without this DNA… MD is not for getting the best figures but really to work with the team, work with the people, managers and create the right atmosphere for the talents, so this is the goal.
Another objective of [subsidiaries] MDs and CEOs also are seeming like ambassador for future leadership in the countries. What does it mean in reality? There is a kind of KPI to be keynote speaker at large events, to connect with local chamber of trade and commerce. For instance, I am leading the [topic] commit in [country-country] chamber of commerce in [city] and there are also our sits on the board of industry advisory council of the largest accelerate for start-ups and this kind of organizations. Usually, we have a level of publicity and the leaders initial lead into the market technology trends, business models trends, topics around robotic, internet of things, machine learning, AI. We participate in numerousness events and even now I give lectures to [nationalities] communities in start-ups twofold, like there are virtual sessions prepared of [country] ministry of trade and [country] foreign ministry in [country] to say: "Ok, we have in this session representatives of large [country] companies" and the [country] start-ups present themselves and in this lectures I explain [organization's name] worldwide in working with start-ups eco-systems for instance, how we collaborate, how we cooperate, the small start-ups, flexible versus very structured positions. These are the topics. What we also exchange is about the big events, like if we did something great in [city] or in [city] for the academia or for large costumers, like localization summits, that is something that we do in [country] and in [country] where we really take public officials from ministry of finance to our event and this public official uses our stage and platform to communicate and the costumer get the feeling that we close cooperate with the ministry and that we are able to implement the legal changes into our [products] in a right point of time.
Researcher: And in which way do you think that this exchange with your colleagues of [ION] is useful for your [subsidiary]?
Interviewee D: We are in a very flexible environment. So, on one hand we have line of business, we have [product] production plan, like development plan and delivery according to these plans. On the other hand, there are market trends that we cannot ignore, (for example) going into […], moving into […], costumers who close their IT departments and going into consumption model and many other trends and it is very important to exchange with colleagues in our [ION]

what is going in the market, what are the technology topics, which start ups they have in their locations which could be introduced in my locations. Because it does not have sense to develop things twice, or three times, we connect the dots. Just to give you an example, yesterday we had two hours call, a [subsidiaries] exchange, between my [subsidiary] and [another subsidiary], because the [subsidiary] in [city] is a quite young one and in term of population there are some big acquisitions, specially hybris, which is now [product] for costumers and so on. It is a large [subsidiary], larger of the [subsidiary] [city] in terms of people but they exist just since 1 year or less, and what the colleagues of this [subsidiary] strategically do, they schedule calls with each MD and CEO where they question: "Guys, how do you work with the market unit?". Or yesterday they asked me "[name], you work a lot with public officials with the [country] government. How do you do it, how do you get access to this people? How do you work with lobs organizations?" and so on. And we just explain them how it works and it is very worth because it is not written anywhere, and if they just reach out some guys outside the [ION] maybe the people tell, maybe not (how it works), but we as a family we have this open culture. I will always help any MD because I know if I give a call, they will share information. And with [city] for instance, you also asked me how they help us with the exchange, and it was quite interesting that one of the flavours of the [subsidiary] in [city] is the connection with sport and entertainment industry, fan community and the current MD was the past MD in [country], [name]. He was (MD) before [name] and after he came back from [country] to [country], he became the industry unit lead for sport and entertainment and actually he was the guy who has driven the development of [product], another products of [organization´s name] for the sport. And entertainment industry and in the other hand in [country] the connection of government and very big costumers from the sport industry is very strong. Sport is very important (in the country of Interviewee D). We have a sport ministry and we know that there are groups supported by the government. There are groups or high sport leagues supported by our [not understandable], therefore doing everything around sport is very important to connect on, kind of, communication channels. My [subsidiary] has a great project with soccer club [name of the soccer club], the champions in [country]. And last year I brought the management of [city] to [stadium]. We had references visits and talk with the CEO of [stadium] and with the CEO of the [football team]. And during one day exchange, they brought many ideas which we later on transformed into co-innovation projects done by the [subsidiary] with this soccer club and was very publicly open. There were newspapers about this collaboration, and we did some business with the soccer club and we have also officials sponsorship program. Now they have sponsorship programs of [organization´s name] with the ice hockey league, with the premier ice hockey league and I asked in the call yesterday: “Ok guys, we told you how we operate, how we structure our collaboration with the market unit, with the public officials, how we work with the HR, how we utilize the central functions together with the market unit, how we save resources, but I have a question: I would like to strength the collaboration with the sport clubs with the league and we would like to drive some co-innovation projects with them, but we don´t have the know-how, we just have will and people and they have the mark, the clubs”. Now we have access to the specialists, to the experts of these products and to the team who has been adopting this product for different clubs worldwide. It is much better than an accounting executive going there and saying: “I would like to make some business, but I don´t know what to sell”. And then the guys and product management have to start from zero. But it is quite different if I say: “Ok, I am the sponsor of [name] hockey league and it is important for me and my office and I have great people here and there and we would like even to collaborate, and we have some partners and start-ups and we would like to have [not understandable], but please give us some infusion, how we arrange this, how are the topics, functional gaps and solutions. Can you moderate us? Can you be in the jury to select the best solution”, and they say “sure”. This is an example on how we help each other. Next time they will come to me with a topic, just have another request, “oh, we have some great start ups in [country] for industry 4.0, we would like to connect with top [country] costumers, because we know that they are now renewing their IT infrastructures and we want to present them something very modern. Can you help us?”. You know, the people from the innovation center in [city], they would not get to an accounting executive for meet my costumers in [country], they will come to me.

Researcher: And when there is a good idea, for example in another [subsidiary], how do you apply this idea at [the subsidiary of interviewee D]?

Interviewee D: If this is a kind of idea regarding the talent management, employee´s development, like “wow guys, we have in [country] this and that training and now our [employees] know how to present or build the business case and they can get approved their projects much faster. What do you think?”, then we would say: “Oh, cool, send us your mentor and we can do the same here”. Like once [ION] told us that there are great experts in users experiences, how to build products that are ergonomic and that people like using the interface and that do not claim that is too complicate and they have to click twenty times.

So, if someone in another [subsidiary] tell us this kind of story we say: “Cool”, then I will set up a meeting with the people manager in my [subsidiary]. I am not ruling like command control like “this is the idea, I brought into this idea and just go and execute”, no, I have my management meeting with others [subsidiary] manager and then I will say: “Let´s bring on the agenda the guy from [country], he has to tell something that I find interesting but I would like to know your opinion on it”. And then they would say whether “no, it is irrelevant” or “great story”. Like, example, also with [country], I think somehow it was a pilot and maybe it is now in production. The guys introduced at the entre point at [organization´s name] recognition by eyes, face recognition parts for internal employees and then, even if you have forgot your badge or cart you just go there and look into the camera, and they let you in. You know, we would not like just to take this idea and implement, we will ask: “Ok, which software did you use? Which sensors did you use? Which camera? Do you have issues with the landlord? Because it is their territory, it is their building and you put some face recognition software and there are other people from outside and they do not sign the agreement on data privacy”. So, we really learn from each other, and this openness and this sharing is very important, because if you go in a formal way you send a request, you fill the form, you wait for five months, the people leave the company or don´t have time for you, but within the [ION] it is more hands on.

Researcher: Ok. And in what way do you believe this network impacts on the innovative capabilities of [subsidiary]? Does this network impact on the innovative capabilities of [subsidiary of interviewee D] for example? Do you think that for example [location of interviewee D] is more innovative also because of the [ION]?

Interviewee D: I say so. So, first of all regarding the motivation, you know, with these [subsidiaries] topics our colleagues they run extra mile not only to develop what they have to develop, or maintain the [product], but sometime they come with really crazy innovative ideas and they are additionally motivate by the fact that they can share it with their peers in other [subsidiaries] and these peers can give them feedbacks and they can then even improve their idea. I give you an example of this kind of innovation stuff. So, we have many [employees] and have these endless “scrum meetings”, so wherever you have “sprint teams”, “developers’ people”, “Java master” or “scrum master”. They discuss what to shape in the next two weeks trip. And what they realised is that the people talk, interrupt, they [not understandable], and then they really need another one (person) or secretary to write everything down what they decide, what are the tasks and so on. There was a kind of [ION] challenge, also with the monitoring and the appreciation…We said to our [subsidiaries] employees: "Guys, in addition to your normal job, please think on what innovative ideas which we can implement and which also can make our [subsidiary] more digital and which can help to introduce some tools that make our life easier and we have less paper work, less emailing". And the guys came back with two pages of idea and said: "Ok, let´s buy a good micro for the room with 12 people and let´s take Google or other speech recognition software and we will program in the way that the software reacts to words like "open item", "to do", "exit item", "deadline", "appointment" and so on". And then we would use twofold procedures: On one hand we will really structure the meeting in a way that the moderator or the scrum master says: "Guys, if I say what is the topics of the day, just don´t interrupt, I´ll tell one by one and our sound recognition machine, our robot, which is connected to high quality micro takes the sound, makes it according and creates documents out of it". But not just like the sounding boards, but our machine can not only recognize the speech and translate in written words, but it creates a protocol. The machine hears key words like "agenda", point 1, 2, 3 and writes agenda then open items "pun pun pun", then decisions. So, the machine reacts to key words and creates a protocol and sends instantly. So, the people are still in the room, they just shake hands and say: "I go home". And they have in their mailbox or notification system well-structured protocols with to do and so on. We found it´s great topic, they create a first prototype, they received all supplies, we present it at [ION]. We have this idea, they use this tool internally, some of our [subsidiaries] use it also. And now we have during the corona crisis our [subsidiaries] MDs offside, where rather we virtual exchanged with other MDs[71]. And what happened during this virtual session is that we used zoom and breakout sessions. And we had colleagues from the operations team from the [headquarter] like [name] and other [name] and they have a very tough job because they are in the virtual rooms, breakout sessions, and they give us some tasks and we start to talk, brainstorming. They have to write down in the screen into excel what we discuss. First of all, I would say it is a very unpleasant job to try to keep everything and write in parallel. Second a portion of relevant information gets lost because they hear something, put 30% of it. I brought some topics which I thought are very important but on the paper they were like something different. I said: "Guys, for the next offside we bring our machine, which we use in our scrum master sessions". They do not need [name], or [name]

[71] Interviewee D is referring to the ION´s meetings.

or myself to write down and to think and correct. You are setting there as driver instructor but the robot with the speech recognition is in the driver sit. And this is a kind of internal innovation. It is not a big deal, but it can make life of 20.000 [employees] easier and improve our cost-efficiency.

Researcher: Now I would like to go a little bit deeper in order to understand the dynamics of network. I would like to ask you which role do different values play in the achievement of the network goals.

Silence.

So, the question is: There are many [subsidiaries] around the world and there are so many diversities, many cultural diversities, diversity in terms of values. Which role does this diversity play in the [ION]?

Interviewee D: I rather would say that several dimensions play a role: Gender diversity, and I think that the [ION] environment is really great for this gender inclusion topic because first of all there are a quite good distribution of male-female [subsidiaries] MDs and CEOs. Then there is a very strong [ION] leadership like [name] and his team who lead a [not understantable], and the topic is every time in the agenda, and this is this culture of acceptance, and it is no way to exclude someone because of gender or any other, let´s say, dimension. For us, the most critical topic on the diversity and inclusion you will not imagine but is the age diversity. Because if you look at the [sector] companies, highly performance company, there is a very clear trend that the people let´s say, like myself about the 40´s, sometimes feel that they cannot adapt to new trends, to new computer languages, new technologies that are fast and there is a clear trend in the industry that they use to try to [not understandable] more expensive and older people because they are not that fast in adopting new skills and so on and so forth. This means that if you do not treat these topics seriously then you have always two parts: In one hand we would say: "Young talents, working with the universities, young graduates, our youth is important, let´s help them and so on". But then you would go back to your desk and think: "Ok, but I have to protect my workspace", because these guys they are challengers, they will take my job tomorrow. They have to be aware of it, they have to consult and to talk with our HR business partners and we are obliged as MDs to be, let´s say, very creative, very intelligent and create the atmosphere where two, three, four generations in the [subsidiary]. We have in our [subsidiary] many people where the parents and the children work here in [country] for the [subsidiary] and in the market unit. So, they have to really balance that the younger not eat the older and then the older let the younger get into projects and make career. And this diversity topic is much more critical than the rest, because if the gender, with the, let´s say, race or sexual stuffs, I think we can handle that very good. With the age topic it is deeper in psychology.

Researcher: And how do you evaluate, you personally not as member of [organization´s name], but you as person, how do you evaluate this diversity, this diversity in terms of perspectives? How do you evaluate? do you think that this diversity in terms of gender, age and so on, positively or negatively?

Interviewee D: For the research and development topics, and this is the work area of us in the [subsidiaries], it is extremely important. There is clear research that more diverse teams get better results in terms of innovation. And you know, as [subsidiary] head, I am not or very very seldom in position that I have to manage crisis, because if you have to manage crisis it is command and control. The less diversity you have, the faster you bring results. If you are in the ship or in the army you really have to get things done and be very quick and make tough decisions and execute, it is one topic, but it is not really the topic for the [ION]. Our goals and objectives are to create best [products], to establish great ideas, create teams and produce these stuffs and for these tasks, the more diversity you have, the more successful you are. Unfortunately, at the [subsidiary] in [country] I cannot have so much diversity as we have in [country] or in the [country] or even in [country], because in our [subsidiary] in terms of nations…I am a [country] citizen and I came back from the headquarter to [country], to my mother country but it is rather an exception. [Employees] from [country] or [country] or [country] or even [country] they do not go to [country in which the subsidiary of Interviewee D is located] to work as [employees], maybe as manager it is ok. And that is the big difference towards our [subsidiary]. If you look at diversity in dimensions age, gender, sexual preferences and so on, we are like all other [subsidiaries], we try to be as diverse as we can. If look at origin diversity, cultural diversity, it is by nature higher in the countries with strong immigration, like [country], [country], [country] as well, [country], maybe [country], so the places that really attract people to go there and live[72].

Part II

Researcher: Yesterday we talked about diversity in the last part of our interview. Today I would like to talk a little bit about common points, about commonalities. I would like to ask you if you are able to identify one or more common points in terms of values among all manager directors of the [ION]?

[72]At this point the time scheduled for the interview was over. Nevertheless, interviewee D accepted to schedule another meeting in the following day to conclude the interview.

Interviewee D: Strive for innovation, establish an innovative culture in your location or region, fight for diversity and inclusion in the [subsidiaries] and very important provide leadership about both aspects: Innovation, technology and culture back to the community, inside out the [subsidiaries], into the market and to academia and to universities. Also, what is very important as a [subsidiary] MD, we trust partners by government, by public officials and by C level of the costumers and there are some messages which are very keen to convey not to, let´s say, board members or head of sale organizations but through the MD of the [subsidiaries]. Because he stands for Research and development for innovation. So, these are the topics (common points): Innovation, culture, technology and diversity and inclusion. A very important part is digital [subsidiary] and digital workplace, digital workspaces. So, what are striving is to say the technology is not only to drive the economy, it is our goal to let technology serves the people in a way we achieve more results in less time, we have fun at the work. It is not about work-life balance, it is more about create a future work.
Researcher: Ok. Thank you very much. Now I would like to talk a little bit about competences. So, what kind of competences do you believe that a [ION] MD should have in order to be able to act with diversity in this context, in the context of the [ION]?
Interviewee D: There are hard skills and soft skills. The hard skills are the easier to start: One of the requirements is, on one hand it is about the [subsidiary], one has to bring clear, say, technology education, so a university degree or comparable, either in [degree] or [degree]. Like myself, my first study is [topic]. On the other hand, as general manager, most of the [subsidiaries] MDs also have the second study, ideally in business administration. I hold an executive MBA from [university] and maybe more than 50% of the MDs also have an MBA or comparable education.
Researcher: And for what concerns the soft skills.
Interviewee D: The soft skills, it is more complex and diverse. The most of the MDs have a rather international career, because if they say "diversity" we think first at cultural diversity, intercultural. So, they definitely really have to bring a very strong inter-cultural competence. And it is also a funny thing, many MDs of the [subsidiaries] lead a [subsidiary] not in the country they spent most of their lifetime. Like, you know, [name], I think he even doesn´t speak [language], but he runs the [subsidiary] in [country] as an [nationality] guy. And I spent the most of my time in [country], not in [country]. I left [country] as a young student and I have never worked in [country] before. So, I went [in the country of the

headquarter], made international career, travel all around the world, spent some time in [continent], most of the time in [country], was project manager in [another continent] elsewhere and then I came back to [country]. This is something that helps a lot because, as [subsidiary] MD you should be a bit, not in distance, but hybrid. You should have some kind of zoom in to drive the daily business. But on the other hand, you should be able to zoom out very quickly and say: “Ok guys, yeah, operation stuffs and this, and this, please don´t forget the overall goal, what is the direction”. It is expected that the [subsidiary] MD is the guy not necessary very deep in operations, but it is someone accountable for giving the right direction. I think international experience is very important.
Researcher: You used the expression “intercultural competences”. How would you describe or define intercultural competences?
Interviewee D: That´s a good thing. We have a database of mentors and coachers at [organization´s name] and we always have to describe what are our key competences as a coach or mentor and I always put intercultural experience, conflict management and sometimes career development. Just to give you an example, when I started in [city] was [year], [number] years ago, and I was maybe among the 1% of non-[nationality] employees, not originally [nationality] employee. And two years late I received my first manage position as people manager. In my team I was the only one not born in [country] and I had 36 people, good mix with 50%-50% on the gender part and that I was younger, I was younger than most of my employees and female employees. It was real fun, I was single, I was young, I was [nationality], I was really the line manager of these rather big team and the most of them had an education in like auditing, so people who studied finance but were not able to pass the auditing exam, which is extremely difficult in [country] and then they said: “Ok, instead of doing it twice we go to [organization´s name] and work in supporting costumers in finance area”. And this is something where different cultures in terms of origin, kind of marginal person in this environment (referring to him/herself). And yeah, I managed to be both, good friend advisor of them but also a manager to set goals, to drive the performance, to bring the team to next re-organization, next level. So, I think that this intercultural competence means (that one) should be able to work with different cultures in terms of nationality, but also quite different cultures in terms of being in [country]. I studied in [city] and worked in [city] for the first times and then I went to [city] and it was asparagus field, really countryside. I came from [city], from a city with 20 million population and then from [city], which is ok 5 million and then it was countryside. It was a completely different culture. The people speak [language] with a very funny

dialect, most of them hadn´t see anything outside [region], came from studying finance and I´m a [profession], a kind of kid from big city, from a completely different culture, but must make fun to one, and you should be able to deal with it. Now it is exactly the opposite, in [city] after 30 years in [country] I am seeing as the [nationality] guy who speaks [language], because my brain is working like a [nationality] engine machine and I like discipline, I write action points and then come back and ask. It is not necessarily the way you do business in [country where the subsidiary of interviewee D is located]. But ok, you should be able to do both. I had once a very good conversation with a colleague who was an advisor to [name], the HR board member of [organization´s name], there was a guy that was British citizen and he was a kind of [not understandable], he built all the service centre of [organization´s name], like Philippines and Czech Republic[73] and so on to work through all of our back office staff. This British guy, somehow, he studied once in [country] and he could speak the language. So, the board member sent him as advisor to our big costumer in [country] to help them run HR transformation, HR function transformation before the implementation the [organization´s name] success factors. The problem was that ours [interviewee D meant employees from the organization under study] sold for many many euros to this [country] bank [product] for running HR business. Then the bank started to try to adopt this [product] in HR and then they understood this does not work in this way. He sent someone with international experience in the topic who can advise the bank first to rethink how they run the HR operation and then to implement. And I asked him: "How can we be successful in this?" and he said: "It is the enacting mastering". He repeats the same pattern every time and he was sent 10 years ago to Prague as British guy to deal with the service centre and he learnt that as soon as you are in the new culture environment, you should keep your rules and the way you see the things for yourself and first try to understand these people, how they work, how they think, how they interact, what is driving them. Only after that you are seen as a kind of trusted guy in this environment you start bringing your presence from your backpack, so, what you learnt in Germany, in Britain and so on. But it does not make any sense to come with your huge culture and try to change the world. This is something, this intercultural experience and skills. If you think about it and understand that does not make sense to come to [country] and say: "Ok, you should do business differently", but just understand what is going on, what is

[73] Here countries and nationality are not anonymized because the text refers to a third person and there is no risk of identifying interviewee D.

their motivation, what are the perceptions, and then step by step bring your own essence and change how the things are going. I think this is the point.
Researcher: Ok, Thank you very much for your insights. And how do you think these competences could be developed? For example, let´s consider someone that is young right now and that person wants to develop these competences. How do you think these competences could be developed?
Interviewee D: First I would propose this young person to try to start in a big corporate. Because the thing is if you start in a family business or own driven business there is less opportunities to change your employee brand and to change location and change units. I would never suggest someone to be a jumper and really change the job each 18 months, that´s not the case. So, I had in my 22 years [organization´s name] career maybe three or four managers but I did very different jobs in different countries. I tried to be in the same line of business but in different locations, different roles. So, I would suggest it is a good start if it is a [sector] industry maybe to start somewhere lower in the rank, like development or as consulter, internal consulting. And not to be from the very first day in the line business, it is better to be in the project business, because in the project business they take not so long, so you can see different people, different environment, do projects. I learnt in watching the corporate that every two or three years there was an opportunity to go abroad, like a task force, and to fill some gaps there and usually, and that was the case at [organization´s name] as well, when they people say: "Ok, we have now to go to China and develop Chinese business" or we had some huge growth in the USA in the beginning of 2000 and there were these waves when the top management said: "OK, guys, all volunteers, you can go in this and that country maybe in different roles but bring some of your experience, it would be great to do". Usually the guys who were 30´, middle 30´, they had small kids, just married. So, if there is a change, really go abroad and take the risk and it always worth. Because in my case I had good teams, I had the change in the year 2001 to go from [city] to [city] and I´m still thinking I hadn´t had to do this but yeah, my spouse was pregnant with the first child and said: "Oh, you want me to go to [city]? I am not that good in [language of the country interviewee D wanted to go]", and I said: "Yeah, that´s [continent], so it will work somehow". But at that time, we could not do it, but there were these changes where it was not just to go to [city] but to lead a function to work. At that time, [name] was already there and this could be a perfect match to lead and build a new organization in a different country and improve my [language skills] that time. But from the reason of convenience, we said: "I have a nice job in [city]". And this are the moments that matter. I would

say always, as long you can afford, like children are not teenager, are not in the school and so, just go there because then you learn new cultures, improve your language skills, do interesting projects and if you are more or less ok the corporate always take you back, so it is safe.

Researcher: Ok. Thank you very much once again. Now I would like to turn from the network to your professional relationship with individual colleagues. So, aside from the institutional meetings in the context of the [ION], are you in contact with other MDs on a regular basis, via email, call, face to face, the medium is not important? With whom and how oft?

Interviewee D: Not on a regular basis. On regular basis I am in contact with the head of the [ION]. We have monthly, mostly more oft, so every two-three weeks call with [name], who is the head of the network and bi-weekly communication with the CEO of the [ION]. Now it is [name] and before it was [name], and I had very intense communication with both at the beginning. I must admit it differs. In my current role actually I have more stress and work load in my second role with my global team in [city] and [country] because it is a new topic, it is rather a new team. I am still hiring people and I have a new manager, and the process is still in the set-up phase, and this is kind of my new job since half a year. I had the same situation as I became [subsidiary] MD end of [year], begin of [year]. That time I needed a lot of advice, and I was really bumping into each MD, topic by topic. I asked: “Who can help me to organize events, convince market unit to give me money”, and then the guys say: “Give a call to [name], [name] has a trick, he made a combination of localization, summit with the innovation service and the guys from the market unit were happy to bring their costumer there and then they paid the bill”. Good History, bump into [name]. Or if I have tough questions about HR, hiring, firing I know that [name] is the guy who is really extremely experienced manager dealing with dual work councils in [country] and [country]. In my situation it is, rather at the moment the [subsidiary] operations in [country] are quite stable. Yeah, we hear each other bi-weekly and then we have a chat, and if someone tells something interesting you write in the chat or to him or her: “I want to know more about this”. Because I re-locate from [city] to [city]. Historically I am still very close to [city] and therefore with the [subsidiaries] MD in [city] or his team, I have more communication. Not necessarily with [name] because he is a busy guy, he also has a second job as CEO of board member, but [name] always responds and advices. So, he is for me more the diligent, he orchestrated: “For this topic go to this guy” and so on. Also, historically with [name] from [city]. Now they are helping him to ramp up his new [subsidiary]. In the past I came to him in regarding all the questions what to do with soccer clubs and said him: “I want to do some sponsoring, can you come to [country]? please come”. It is more occasionally. Maybe we should do it more on an operational basis. There are some [subsidiaries] MDs who have employees who report into them in another country [not understandable]. And in this case, I said at on the operations, really on the day-to-day operations, [name] from [country], because [name] was up to recent times not only head of the [country] [subsidiary] but had several functions in product support based in [country]. Therefore, if either they had issues, with the [subsidiary], with myself, with something in [country], with costumers, they get to him as solid line manager and then we resolved the issues. But we already know each other also for 20 years. So, this is somehow how it works and usually with the [subsidiaries] MDs it is more really about: “I have a problem” and I know which [subsidiary] MD can help me directly because this topic is handled in [his/her subsidiary]. Like if I have start up or security issues I can go to [name], they do good things in [country]. In terms of event management, marketing, employee experience for me the best advisor is the lady in [country], so the previously MD [name] and now [name], she was CEO. [Name] is a trusted advisor if it is really about soft part, culture. There are also topics like in the past a young lady from my [subsidiary] wanted to be relocated to [country] and there was a good position, and the hiring manager would take her but there was an issue that [name] had the global mobility budget. If you send someone abroad within the corporate you have to pay this and that and it is too expensive and normally we do it just for younger developers from [the subsidiary of Interviewee D]. And this is a good example how [subsidiaries] can collaborate. I gave a call to [subsidiary] MD in [country where the employee wanted to be relocated] and said: “There is a lady, [name], it is pity for me that I lose a talented person, but I can imagine why she wants to go to, [country] is great, location [city], I would not stop her, I would rather try to find a win-win how we can make it, that we don´t violate the corporate rules but help the lady not to get…”…One of the work around was that I fired her and she applies from the street. I said: “That is stupid, she has been working for us, she is a young talent, top talent, why should I fire her? It is unfair”. And then we discuss this topic, it was just one day before Christmas, a couple of years ago and [MD from the country in which the employee was relocated] told me: “Ok, we have a really good HR director, I will connect her with yours and I will advise her that she takes the case seriously and find a solution”. And we found a solution and [name] is in [country] already for three years. It is fine and we did not violate any corporate rule. Unfortunately, not too many people want to go to [country of Interviewee D] from other locations, so I cannot help them (Laugh). But there are many requests for [subsidiaries] MD about students and if, let´s say, [country] says: “We have someone, we would take her or him as intern to work at our [subsidiary] but we do not have headcount, they need kind of international experience”. And we have some case also with [city] and with [country], so countries that are not far from [country of Interviewee D] and these collaborations would work easily. And it is very informal.

Researcher: Ok, thank you. And I would like to know how this network, [ION], helps you to manage the challenges and opportunities of your [subsidiary]?

Interviewee D: It is, as in my previously speech, if there are some challenges which we can solve within the [subsidiary], and usually, I would say 80% of things we can just solve locally because we have strong management team in the [subsidiary], very good experts, access to great graduates. So, we have a lot of assets already in our place and we also have market unit. So usually if there is a challenge, an issue, a new stuff I consult the leadership team of the [subsidiary] and say: “Guys, there is a topic on the table I would approach in this and this way but maybe you get some other ideas, please share and let´s think what is the most pragmatic and not expensive way”. In some cases, we cannot do it within the [subsidiary] but then you don´t go abroad, we approach the market unit, because in the market unit the money is there because it´s a sell organization and in the market unit there are many functions that we do not have locally in our [subsidiary], the whole topic about marketing, finance, facilities, security, IT security, also legal. And provided we cannot solve the issue or challenge in the [subsidiary] and market unit is not able to help, my third station would be first contact [name], [name], the operation team (of ION), [name] and ask them for help and advice. Usually they would say: “Ahh, three weeks ago this [subsidiary] had a similar topic, talk to him or her”. And then it is really social network. To give some content on it, in our [subsidiary] we have many lines of service. On the service side we are more or less complete, every globality has a local footprint. On the development side it is exactly the opposite. We have three or four development areas, we do not cover everything. For instance, in using [product] the guys (clients) claimed, start-ups are claiming that they rather go to our competitors because with this [product] we don´t want to go and so on. And we know that there are very good [product] specialists in [country] and in [city]. Here the topic is really to trigger the network and say: “What do you think? Which of the [subsidiaries] can provide us on side remote support and so on”. The same was with the design thinking. They do have in the market unit, in the pre-sale organization so called design thinking coachers but they are more to please the costumer. If the costumer's chief of innovation says: "I need [organization´s name] advice and have to establish innovation road map" then these guys (design thinking coachers) can really run the show and it works. But for us, for [the subsidiary], we need sometimes design thinking to go two levels deeper for [employees], to create something new. And it is less about market, it is more about really to create some technical stuff but having the experience of the end user in mind. And we approached the network and then usually there are some initiatives in other parts of the organization. I had today, for instance, a talk with the research centre in [city] and the guy in [city] is now line manager of one of my leadership team members in [another city], just an appointment because the guy in [country] got in earlier retirement. And this is a typical case. Every time a manager in [city] becomes a young leader somewhere, I drop an email and say: "Let´s have an intro call", and just look, maybe there is some chemistry, and we can talk. It was very interesting, we exchange a little bit and then I said: "I would like to catch costumer experience with our legal changes and how we deal with it because here a lot of soft and subtle complains that our [subsidiary] is not fast enough and we have less response than expected by the market due to some really important legal changes, and as long as I hear it here from the sell people I can ignore it because the costumers try to negotiate, something they know that is our weak point but if I continuously here it from the costumer I have to do something, but how?" And then he said: "We have a project at the [subsidiary] in [city], we call it [name of the project] and it really touches exactly the same topic – localization service". Because in [country] they have more complain so the company have to do something and then they decided to use the [subsidiary in the country] as a kind of sand box, pilot space for this initiative. And then I said: "Ok, now I know that my first call on Monday morning is to [country], to the [subsidiary] MD [Name] and then we will try to cope and paste the same framework.

Researcher: Ok, thank you very much. I have a last question for your and afterwards you will be free: I know that there is a value inside [ION], and it is "build bridges not silos". What does build bridges not silos mean for you?

Interviewee D: Ah so, funny thing because the absolutely same name "build bridges not silos" and then "building digital bridges" is used in the [country]-[country] chamber of commerce. It is explained to the [country] public officials that they should not push too hard to [country of ION] companies in [country of Interviewee D] and just say: "You want to sell here [country] stuff or spend money and then you should do this and that and complain". And then you explain to them: "Oh guys, let´s build bridges not silos". They say: "look, you have a lot

of [local country] start-up here in [country] and they think they are great but actually there is no comparison to the international start-up eco-system because a start up in [local country] usually 90% of the people never left [local country], they speak only [local] language and they approach the [local] market and this is completely stupid because if you are a start-up and you want to attract venture capital you should think global and not try to be only in this local market because the [local] market it is 1,5% of the global [sector] market. So, instead of pushing us to complain to all the rules and so on you can utilize us as the bridge to bring your start-ups, to teach them how to reach internationality. We can connect them to our international council in [country of ION], they can get our technology mentors, our venture capital ventures and so on. And then they say: "Ok, let´s establish a state finance program – building digital bridges" and it works.
Build bridges not silos in our context can be very specific. If you go top down, they have now two, three board areas who are in charge of developing technology, like [name] and several [subsidiaries] in the technology part, so all the applications. And then there are still some developments around [product] or [product]. And the trick is that if you are a board member and you have a plan to develop hundred tons of program codes, what you do? You take your next level manager leadership team and say: "We have this, this and this programs to develop and these are the priority. So, you guys have to explain who will develop this stuff, who will maintain this stuff and so on". And these guys ok the next level down, they look at the location strategy and say: "This part of technology it is better to do in [country], [country] and [city]. This part of application we do in somewhere else". Do I explain what I am trying to say? We have internal competition, because every [subsidiary] MD wants to get more projects, more people, more budget, it is the nature. Besides of all our objectives with the culture and goals, we are factory managers, factory to create great [product], to maintain it and to implement it. Therefore, in the normal world, I would say even at [organization´s name], outside of [ION], they still have a lot of duplicated functions and very strong internal competition. In the [ION] we have another culture. We say: "Ok, it is clear, but the goals are that we need the best [products], created by the best people and let´s try really to help each other instead of hiding information, or hiding resources". Like I give every year fellowship but also I give fellows from my office in [city] or [city] that the people help other [subsidiaries], other MDs, other development units. As soon as we have the competence, then we can define the trade-off. For sure, fellowship is like three to six months. The person is not doing the regular job what the person is paid for, not working for his or her manager but doing for someone else in

other [subsidiary]. On the other [subsidiary] it is a great experience for the person. We have this employee talent development on our agenda and within the [ION]. If you compare to the rest of the organizations, [organization´s name] have much more fellowships, international fellowships, not necessary with mobility, but sometime also. I have every year at least one person going to [city] for three or six months and we also expected the same from our peers. So, bridges are like: “Let´s forget in the first two steps our own hidden or not hidden interest like head count, marketing, budget and so on and so forth. Let´s have one goal and then define how we can help each other, make it happens”. The good thing is that we have many programs like development exchange, development exchange education programs which are run for people from one [subsidiary] for the other [subsidiaries]. This kind of stuff.

3.5 Interviewee E

Researcher: I would like to start by asking you how you would describe the [ION]?
Interviewee E: Ok. So, the [ION] is an internal organization that groups different IRD focus offices of [organization´s name] around the globe thanks to a distributed eco-system. So, we can gain advantages from local eco-systems, start-ups, universities. In that way we can also improve innovation, in that way we can have some innovation specialized in specific areas and so others can specialize in (other) different areas. I am talking quite general, not going into many details.
Researcher: Ok. No problem.
Interviewee E: In that way we do not need to start something fresh.
Researcher: And which goal does the [ION] pursue?
Interviewee E: Which goal?
Researcher: Yeah, what is the goal of the [ION]?
Interviewee E: I would say the goal is to collaborate across different locations to share a kind of programs, to work together. Firstly collaborate, secondly to, let´s say, have the same kind of criteria across different regions and different countries. To spread the knowledge basically.
Researcher: And why do you think that to collaborate is useful?
Interviewee E: Why collaboration is useful? In that way we can easily exchange the knowledge. Maybe I would say the usefulness of collaboration we can hear about different approaches of doing stuffs which probably would not be invented

in our locations. So, let´s say, there are different approaches among different cultures of the employees, different solutions that we can implement and, let´s say, each country, each region has [connection problems].

Researcher: [name], I cannot hear you. Hello? I cannot hear you. Yeah, now I can hear you again. You were saying that we can hear about different approaches among different cultures. Sorry? Can you hear me? Can you hear me? [at that point we started communicating in the chat because I could not hear him/her – I left the call and re-entered again, but it did not work, than we shift to another platform].

Interviewee E: Should we start from the beginning?

Researcher: No, it is not necessary. I asked you why collaboration is important, and you told me that it is because you can exchange knowledge and you can hear about different approaches among different cultures and then I couldn´t hear anything. We can start from this point.

Interviewee E: Yes, I was saying that in different countries or regions there are different approaches of employees, and they have different ways of working or different environments. But what is common across different regions is that we want to increase employees´ engagement so there are different initiatives that can be invented in different countries and whatever something is well receive by employees from that location we can exchange and implement the same in different countries. I could give you an example: Once we [the members of the ION] had a chance to meet in [city], last year, and I heard about so called "Green Team" that was very effecting in that location. People that are very positive to the environment and try to influence other employees with their ideas. So, the [subsidiary] in [city Interviewee E visited] offered that kind of space for them where they can grow plants for example, or they can [connection problems].

Researcher: Hello? Hello? [we used chat to communicate]. So, you were talking about something in [country], something that is green.

Interviewee E: And that is all that you heard?

Researcher: Yeah!

Interviewee E: Oh, I was talking for another minute. Let just come back to this. So, when we had the chance to visit [city] location, we…I have seen how they engage people who are environment friendly, let's say ecologists. They built that space in the office where they could, for example, grow plants and invite other employees to share kind of spirit, to have no waste, all the ecological aspects. And when I came back to my location, I rouse this idea and quickly some people also could lead that, so that [the initiative] grow their engagement, and they quickly found ways of doing things differently in the [subsidiary]. We were quite

ecological friendly and there were some new ideas how to, let´s say, not to waste energy on air conditions. We also had some additional speakers from third parties that basically shared some more ideas how ecology is important, how we should change our behaviours. That was an example. It never crossed to my mind or anybody else in the location, but this trip opened my eyes that something could be done differently.
Researcher: Ok. Thank you. And what kind of information, apart from that, do you exchange during the meeting with your colleagues of the [ION]? [At this point we turned off our cameras to improve the connection]
Interviewee E: I couldn´t hear your question.
Researcher: What kind of information do you exchange during the meetings with your colleagues of the [ION]?
Interviewee E: We have this bi-weekly calls or even right now during the Covid times we have weekly meetings where we invite some speakers that can share information about the global programs, about HR topics that influence everyone. We hear about some common strategies or issues or initiatives. We also exchange about situations that may affect us. These are the main frames that we are talking, but usually some of the locations can have additional knowledge about that specific topic and they can say in which way they implemented it. And immediately after we can see clearly that something did work, something must be changed a bit in a way to make it works to our location. Basically, these are frames: Global programs, initiatives, HR topics or some common strategies for the whole organization.
Researcher: Ok. Thank you very much. And which way do you think this exchange could be useful for your [subsidiary]?
Interviewee E: Which way?
Researcher: Why do you think that this exchange with your colleagues could be useful for your [subsidiary]?
Interviewee E: Ok. I answered before but maybe it was not heard (because of the connection].
Researcher: Sometimes I will ask you something that maybe you have already answered but that´s normal because I want to have a kind of confirmation, let´s say.
Interviewee E: Sure, ok. So, to rephrase. Especially it is useful that we will hear the approaches of implementations. Sometimes there are some ideas discussed and we could not, let´s say, from the local perspective in [country] we have 400 employees and globally we have 100.000 employees. So, it is clearly easy to say that some ideas could be already be worked on in some locations even before we

think about that. So, in this way, this collaboration can give us the information what work or not or I can at least ask the question whether somebody tried that and get the opinion if this is a good idea or not. So, these are the main things that cross on my mind.

Researcher: Ok. And have you ever applied some innovation or suggestion that you got from these meetings, that you got from your colleagues?

Interviewee E: One example was that green team for example from [country]. The other one was…we exchange how we collaborate with costumers locally because the [subsidiaries] are usually R&D centres, they are not sales focused but we should have a space in which we collaborate with our customers, for example to share ideas, to organize workshops. And our common approach is that we organize so called costumer engagement centre in different countries. It looks (in each location) differently but in essence it is a place where we present our [product] in a fancy, nice way with multiple show cases and this is something that I learnt from discussion, from travellers to different locations, how they implement it and then I did similar things in [country]. Another very useful example of this is how each [subsidiary] reacts to Covid 19. So, of course we had the first cases in China and China was definitely the first [subsidiary] which was affected and so how they successfully close the offices and late on what were the steps to open the office after the number of cases drop. And that was a very good knowledge exchange because we could then see what can work in our location and basically in which part of the pandemic we are right now compared to the countries that already are, let's say, few weeks in front of us.

Researcher: So, do you believe that this network impacts on the innovative capabilities of the [ION]?

Interviewee E: Yes, definitely! I mentioned before, but for example we have a global program called [name of the program], that is the short, the abbreviation of [anonymized]. Some [subsidiaries] have an extensive knowledge in one topic and whenever there´s a need to use the technology or the solution in different [subsidiaries] we can use the knowledge from this expert [subsidiary] to quickly import people from other locations. So that way we can teach each other technologies, teach each other best practices about implementations.

Researcher: Ok. Thank you. And in what way does this network help you to manage the challenges and opportunities of your location?

(Silence)

So, for example I believe that [country] has a lot of opportunities, for what concerns of course your job, there are lots of opportunities but also challenges. Has this network ever helped you to manage these challenges and opportunities?

Interviewee E: Yes. I was thinking about the best examples. So of course, as I said, different countries have different challenges. My challenge right now is to position our brand across other [sector] brands in local area to be very, let´s say, very good employer, like to be the position as best employer in the region. It is to say that we are happy, and we know the value that [organization´s name] brings and we like work at [organization´s name], but to have this kind of employer brand that basically will give, will increase the pipeline of candidate, let´s say, that would like to work for us. This is a challenge that I have, and different [subsidiaries] have different approaches to this. They tried for example to present themselves on different [sector] conferences, some others have ideas how to increase in presence in social media for example. So, that kind of exchange in these areas and knowledge and experience sharing helps me to overcome these challenges. So based on their best practices I can build a strategy locally with local resources. Does that answer your question?
Researcher: Yeah, yeah, it was enough. Would you like to add something else?
Interviewee E: No, I´m just not sure if I answered the right question.
Researcher: No, it was a perfect example. Thank you. Now I would like to go a little bit deeper in order to understand the dynamics in the network. So, I would like to ask you which role do different values, diversity play in the achievement of the [ION] goals?
Interviewee E: Can you repeat the question just to be sure that I understand it right.
Researcher: Yeah. So the [ION] is characterized by diversity because there are many [subsidiaries] around the world with different values, cultures, ways of thinking, different perspectives, different ways of seeing the world. So, for example [country] has a perspective, maybe [another country] or [another country] or [another country] or [another country] has another one. So, there is a lot of diversity inside the [ION]. Do you think that this diversity plays a role in the achievement of [ION] goals?
Interviewee E: Yes. I would say so. And that is something to be said, this diversity brings different points of views on different things, so we, as to say the group part of the [ION], we always treat each other with respect and understanding and we really learn from each other and that´s a kind of open mind. And this diversity then brings new angles, new ideas. Yeah, I am sure that this is the right answer to this question.
Researcher: You used the expression “learning from each other”. Could you please explain me what do you mean by “learning from each other”?

Interviewee E: I mean, sometimes the best is to talk with examples. There are some, let´s say, outside of the [ION], there is always whenever we have collaboration, let´s say, on a specific project, let´s leave the [ION] and just talking about something else. Whenever we work on project there must be defined a leader, there must be defined somebody who will executed. In the [ION] collaboration there is always a kind of, let´s say, everyone has, there is no leader defined, there is no one that must execute something. It is a kind of forum in which we share idea, there is no must to implement specific ideas, there are just, let´s say, frames of collaboration but there is no a need to, a “must do it”. You know what I mean?
Researcher: Yeah!
Interviewee E: So that brings, for example, the person takes a part in those discussions and quickly note that “ok, this is a forum where I can share what I know but definitely that´s a place where I can get a lot of information of other ideas, of other things, how they work, whether that makes sense or not. I note a lot. These are the highlight topics, this is a nice idea and then late on I can evaluate with my local team. That is how it works more or less.
Researcher: Ok. And for what concerns this diversity, how do you evaluate this diversity, I mean, what is your opinion. Now I am talking about your personal opinion, so your opinion as person and not as member of [organization´s name]. What is your opinion about this diversity? Do you think that it is something positive or negative and why?
Interviewee E: Definitely positive. Of course, it brings different dynamics on the conversation, it brings different point of views. They want this diversity. More or less the idea will be done in the same way across different regions and just because there is diversity, not only culturally, not only gender, but in general. It works because…I missed the words, English words.
Researcher: No problem. Please take your time.
Interviewee E: What I meant is, personally I see the value in the diversity because if I would think in the opposite, so if would not be any diversity the ideas and experiences of each individuals would be more or less the same and just because there are people from different cultural environments they have immediately different points of view on things, they ask questions which would not cross my mind for example.
Researcher: And apart from diversity, are you able also to identify common points among all MDs?
Interviewee E: Yeah. I think a common point would be definitely open mind approach, respect and willingness to learn and share ideas.

Researcher: Ok. Now I would like to talk about competences. What kind of competences do you believe a [subsidiary] MD should have in order to be able to act with diversity in this context?
Interviewee E: Can I repeat the same? It is really respect and understanding of diversity, they are the most crucial things. Is that a cultural competence, in this sense?
Researcher: What kind of skills and competences, not only cultural skills but also every kind of competences that you think could be useful to be a good MD at [ION]?
Interviewee E: I think I am not good during of this call because of technical difficulties, but open communication is the right thing. So, transparency, we should always tell what we think and not try to hide anything. So, transparency, openness, open minded and willingness to listen.
Researcher: And how do you think these competences could be developed?
[silence]
Let´s say that we have someone that is not a MD but in the future will be a MD. What should this person do in order to develop these competences that you told me, so open communication, transparency, open minded, willingness to listen. How can someone develop these competences?
Interviewee E: I think the main thing that should be achieved to be a MD is to have the chance to work in different environments, so try to travel to different locations, but not necessarily to spend a year or so but just understand how people are, they have different work environments in different work cultures, so basically to live days of life in different cultures definitely helps, so to have projects which require to collaborate across different experiences. Maybe I can give an example, it is good to have a project which is completely outside of the current, let´s say, experience meaning, in what I am an expert at, I am talking about something additional and to do these additional projects with people from different locations, different cultures as well. For me personally helped a lot when I had the chance to have a quick office trips to [city] in the [country] and I had team members in [another country], where I spent couple of months, I think in the last couple of years altogether. So that also helped me a lot in communication.
Researcher: But also for the other competences? Transparency, open minded or do you think that this exposure to other cultures helps only for open communication or also for the other competences that you mentioned?

Interviewee E: Transparency is probably more like, it´s hard to learn transparent communication. So should be just on yourself that should not keep something hidden. It is a hard question, honestly, how we can develop it.
Researcher: Yeah, but I just want to know your opinion, so there is not a right or wrong answer (laugh).
Interviewee E: (laugh) I was thinking how to develop. I think that people just should understand that it is good to be focal about things and if you don´t tell that something is not right, that something does not work and you just hidden that from anybody else, then nobody will hear that feedback and will not take it into…sorry...
Researcher: Into account?
Interviewee E: Yeah, they will not take it into account. But how to develop this? That is a tough question, sorry maybe I gave hard cultural competences, transparent communication, because seriously I don´t know how to develop this.
Researcher: Ok. No Problem. Now I would like to turn from the network to your professional relationship with individual colleagues. So, aside from the institutional meetings in the context of the [ION], are you in contact with others MDs on a regular basis, so via email, call, face to face, the medium is not important and with whom and how oft?
Interviewee E: Ok. We set up, previously from Covid-19 times we had, I think, bi-monthly, so not that oft. Additional calls (I have) in the group of [regional network], so [country], [country], [country], [country] and [country). So, in this group we collaborate. Right now, we have, we had bi-weekly calls during Covid-19 just to exchange more often about the office and company rules and how the situation develops in different countries. There are online meetings and once a year we plan an offside in one of the [subsidiary] from this area. And why this area? We are closer geographically, so it is easy to travel between our cities and we have also similar sizes and similar issues in each of those [subsidiaries]. Each of these [subsidiaries] has less than thousand employees for example. So, there are different issues, different things work there than for example in [city] where there are 20.000 people, right?
Researcher: I have one last question for you. I know that at [ION] there is a value “build bridges not silos”. In your opinion, what does “build bridges not silos” mean?
Interview E: That´s mean that we shouldn´t never say that that´s not my area or responsibility for example. That one, somebody, is asking you a question you shouldn´t say: “No, that is not my topic”. You should either try to help or try to point the right contact. Of course, it is always hard to get immediately the right

person, but people know that and it is quite often that people are pointing: "I do not know this but this person should be able to help you". And whenever we have a need to build something that requires lots of different experts from lots of different areas, people try to understand how it should be done and to collaborate to a common goal.
Researcher: So, it´s about collaboration
Interviewee E: It is about collaboration, but it is also a kind of willingness to support.
Researcher: Ok. Thank you very much. It is all from my side.

3.6 Interviewee F

Researcher: I would like to start by asking you how you would describe the [ION]?
Interviewee F: Since you spent some time in [country] and probably you met with [name], MD of [country].
Researcher: Exactly!
Interviewee F: So, the [ION] maybe you figured out by now, it is a network of the [subsidiaries] that [organization´s name] has across the globe. These are mainly the locations that we have across the globe and so the network of the [subsidiaries] is really where you come together, where we share our best practices, learnings, where we also use the opportunity to discuss and deliberate on some of the key strategic decisions that [organization´s name] is making and how we as a [subsidiary] contributes towards that or things like talents acquisition plans and how we are building on the talents on a particular location, how we are tapping that exist in a particular location, learning from each other in terms of some of the practices that others are following. Also becomes very interesting in the [ION] is that every [subsidiary] is different, so it is not that we have a best practice and it can just be adopted as it is across the [subsidiaries]. Of course, there are cultural and regional flavours that exist in every location, which we also adapt and tailor accordingly. But the [ION] is really where you see all the locations across [organization´s name] coming together. The [subsidiary] that I head up here in [country] is the second largest [subsidiary] for [organization´s name] outside the headquarter. So, the [subsidiary] in [country of interviewee F] has close to 9.000 [employees] in this location, which makes it also the second largest [subsidiary] like I said. What is also pretty unique to [subsidiary of the country of Interviewee F] is, unlike other [subsidiaries], we

also have the entire business product portfolio represented in one location here in [country].
Researcher: You used the word "learning". How would you describe learning in this context?
Interviewee F: So, learning…So for example we as the [ION], just let´s take a very concrete example of Covid, which we are going through right now. So, during the Covid pandemic, not during but I would say as we go through it, one concrete example of learning is China. We had the cue when it came on how they dealt with the pandemic. Already in January it was clear the China was closing the boards and so on and they went to a full lock down towards end of, I think, January and very quickly the rest of the [subsidiaries] were of course very [not understandable] to what was happening in China. Of course, at that point in time everybody thought "that´s not going to happen here". In [country of the headquarter] they also thought that, in [country of interviewee F] we are like: "Ah ok, that´s not going to happen here neither". But very quickly everybody realized that "oh, this is going to impact all of us!". So, one concrete example of learning was very early on the [subsidiaries] networking together. We had a lot of discussions with [name], who is the MD of [subsidiary] China, together with [top manager], who heads up the [ION] and we very quickly also share best practices, we very quickly were able to go and check the set up our crisis management teams, our local pandemic task forces were set up. And this is a concrete example of learning from the [ION] where we do not wait for the crisis to impact us. In this particular case it was Covid, but learning can be applied to lots of other things as well, like a recent example is where [subsidiary] in [country] had, looking into a particular example of how they have got together with all the people who are appreciated by others. We have this tool called [organization´s name] appreciation where you can appreciate a colleague in your organization, and sometimes the person is appreciated and that´s very good. His or her manager comes to know, but in [subsidiary] [country] what they did, which I found very unique, they got these people who had the maximum number of appreciations, because naturally for somebody who gets some many appreciations they are obviously doing something really good, bringing them together in an informal chat with the MDs and this is something that now we are concrete following in [country of interviewee F]. So, one more example of how that learning could be translated into.
Researcher: Ok. Thank you very much. And which goal does the [ION] pursue?
Interviewee F: Yeah, like I told you the target goal is really about how can we accelerate and motivate and bring together the teams across our development

targets to work and deliver an executed upon [organization´s name] strategy. Because on one hand you have a strategy, but it is the locations like we have in [country], [country], [country], [country] that actually help in translating the strategy into reality. So, our goal, if you ask me, is to be able to break down and translate the overall company strategy and to be able to translate that into every line of business that is existing in the [subsidiary] and to be able to translate to every [employee] and give them also everything that they need to be able to deliver on those goals. That´s something that we see as a concrete goal. But the second thing is also about best talent acquisition, because we want to have the best people working for [organization´s name] across all locations, we want to maintain that standard of quality of the talents that we bring into [organization´s name] and, as [ION], that also becomes a very goal in terms of attracting and retaining the best talents in the industry.

Researcher: Ok. And for what concerns this translation of strategy, how does it occur for example in [country of interviewee F]?

Interviewee F: So, let me take a concrete example again. Just last week, last Friday we had [name], the executive board, talk to us about, because this week is the [event]. [Event] is the most largest corporate event for [organization´s name] where we roll out the strategy to our customers and the entire eco-system. So last Friday was where [name] first call the leaders across the organization and talk about what is coming next week. By just translating how I took that, this week was my leadership meeting with the entire leaders in [subsidiary of interviewee F]. This is a team of 45 leaders across [the subsidiary] who represents the larger [not understandable] here in the location. I explained the strategy to them, where are we focusing on, what is some of the announcements that became up at [event] and now we had a concrete action that is taking from that where every leader has to cascade that onwards to…Towards the areas. Because again, we have a strategy, but you have also to translate what you are doing to be able to map towards the overall strategy. So that´s one thing. From the 15th of July there is also a detailed strategy cascade that is happening across all locations, starting from the board, to the senior executives onwards and up that we also give these leaders these concrete package, information packages, which allows them….And we created what is called strategy ambassadors in the [subsidiaries] and these ambassadors, who can be invited to see team meetings, or into all hands meetings and be able to concrete help answer questions around the strategy or documents. So, this is how you can a kind of cascade the strategy into the organization.

Researcher: Ok. Thank you. And what kind of information do you exchange during the meetings with your colleagues of the [ION]?
Interviewee F: I gave you many examples already. Like just yesterday, which is just fresh in my memory, we had a [ION] meeting where we had the head of [sector] talent acquisition coming into the meeting and talking about what is the renewed strategy when it comes to talents, hiring in the [sector] space. And again, you can imagine a [sector] hiring is happening across all [subsidiaries], we are all keen on understanding what strategy, what is some of the plans, what is some of the tools, what is some of the timelines, what is some of the best practices that they recommend to us. That´s one thing. The second thing we discussed yesterday, which is also very relevant is the [program]. So, for example every [subsidiary], we have now identified some of the top universities. In [country] we identified about 5 universities that we will work with and very close proximity and across the world we identified 16 universities. So, the [program] laid out guidelines for every location to follow in terms of how we build that engagement, how we build that deep relationship with the university. So, these are some examples of what we exchange there. I can give you another example, just last week we also had a [ION] offsite and in the offsite we had [name], an executive board member for product engineering coming and sharing his expectation to everybody, all directors, in terms of what he expects from all the development locations. Then we had [name], who is our chief technology officer coming and talking about technology strategy and how he plans to evolve the business technology platform and how it´s going to be the basis for everything that we are building on. So, these are some examples very going across. And of course, then it is up to every [subsidiary] director, like me, to take it and translate it into what that means very specifically for [own subsidiary].
Researcher: Ok. And in which way do you think that this exchange could be useful for your [subsidiary]?
Interviewee F: Yeah, I think again we touched on that. So, [subsidiary of interviewee F], like I said, is very unique as a location. Why? Because it is the only [subsidiary] actually which has every line of business of [organization´s name] represented in one location. I´ll give you an example, if you take [city], [subsidiary in another country], they have a very strong focus on [product], or if you take [country] for that matter they have a very strong focus on [product]. But [subsidiary of Interviewee F] is unique because you have S form, we have the business network, we have procurement, we have success factors development, [products], everything is there. Everything what [name] and [name]…And we discuss there has a direct impact on [subsidiary of interviewee

F]. For example, upcoming June 30th it is my all hands with the entire [subsiadiary]. We have a regular all hands that we have on a quarterly basis and that´s an opportunity which I will use to address the entire organization and make sure that some of the key tasks from our executive board are also translated into the large organization. Like I told you, yesterday was the roll out into the leadership team, which are the 45 people but also be cascade across. So, in that sense it has a direct impact on what we are doing at [subsidiary]. I hope that answers your question.
Researcher: Yeah. To be more concrete: Have you ever applied some innovation or simply tips and tricks that you got from these meetings?
Interviewee F: Yeah, maybe I would say, I mean I have also to say that I come to this role end of September last year, so I have not been the MD for [country] for ever (laugh), so it is more than six months I´m in this role and a couple of many things that…We also share back, so lots of things that we innovate and create out of [subsidiary of interviewee F], which I think some of the other [subsidiaries] are taking up and following. For example, when I took on this role, I introduced what is called [name of an initiative] for the [subsidiaries], because I though, I mean in one hand it is the strength that we have a line of business represented, but at the same time it was important to bring together people, collaborate, share also within the [subsidiaries]. And this is why we kick off this initiative called [name of an initiative] where we brought together people from LOB (line of business), forms teams, be also rolled out details in terms of the core processes that we supported, like total work force management design to operate, source to pay, we look into strategic sourcing, procurement. So gave people that basis knowledge and then to build up on that. We also brought innovation exercises which allowed them to take this core business processes but then come up with innovated ideas around it. And then we have a kind of judging where the best teams were identified and then we brought back those ideas back to the core product. This is a very new thing that we started, it allowed for a lot of collaboration within the [subsidiary] and so we brought it back into the [ION] and the project head presented what is it. We also offered entire modules that can be taken as it is by other [subsidiaries] and executed in the same format. So, this is one example where we started something and shared it into the [ION] and now other [subsidiaries] are taking it up. Another example that I gave you earlier is also about [subsidiary in another country] where, like I said, the appreciate tool where we bring together the people who get the maximum appreciations, have an informal chat, understand why they are so extraordinary and what is, what they do that make them so extraordinary. In summary, I would say, there´s

a lot of learnings where we say: “Hey, that´s a cool thing”, and why don´t you bring it into our [subsidiaries] if it is not already in place.

Researcher: Yeah, so in general in what way do you believe this network impacts on the innovative capabilities the [ION]? I mean, do you think, for example, [subsidiary of interviewee F] is so innovative because of the [ION]? Is There a relationship between innovative capabilities of [subsidiary of interviewee F] and [ION]?

Interviewee F: Yes and no, because I think many or pretty much every location has its own kind of identity I think anyway. I wouldn´t say it´s one because of the other, but it is a kind of coexisting, not coexisting but co-supporting I would say, because one support others. In terms of innovation, [subsidiary of interviewee F] is also one of, a location where it is very common to see a very high number of patents and ideas been submitted. Now, if you ask me is it because of the [ION], I don´t know, I don´t think so. I mean, that´s something that happens within the [subsidiary] and because of the kind of people that we have. We have a mix of very young population, so almost 50% of our population is really people who are a very young talents, so in the T1, T2 levels. That´s a big crux of the population across this 9.000, which is a significant piece of the… And there´re also very people who are extremely motivate to common up with ideations, very passionate people. I think that is also a cultural thing, because in [country] there are very driven people as well. But at the same time, if I come back to the [ION], this is also a great place to kind of bring together some of these ideas, share from each other, share some understandings, what another location is doing in terms of starting an eco-system. Because [subsidiary of Interviewee F] again was one of the first one back into 2016 to start a start-up initiative. We have a start-up study that have about 78 sits where start-ups, especially start-ups in the B-to-B [sector] space, we are incubating them, we are working with them, and many times this is also a great playground for innovated ideas to come up. Of course, we come back to the [ION] and share this, but I wouldn´t say it is only because of the [ION] that we have innovative ideas in [country], I wouldn´t thing that is the case.

Researcher: But it helps?

Interviewee F: It definitively helps, yes. That´s what I was trying to say.

Researcher: Ok. And in what way does this network help you to manage the challenges and opportunities of your specific location?

Interviewee F: Yeah, so in [country] one of the biggest opportunities is, if you ask me, there are some of the best talents of the world. We have some of the best universities here when it comes to [topic]. I think [another country] is even higher, if I remember, however I think that the advantage of [country of Interviewee F] is also people very comfortable with English, and that´s a huge strength for [organization´s name] and this is also why we engage a lot with the talent acquisition teams across [organization´s name] also to see how best we can leverage these talents for [organization´s name] not only for [country]. These are also things that we bring back again into the [ION], share some of the ideas when it comes to talent acquisition, what are we doing in terms of improving our brand, in terms of working with the local governments or with the central government here. Now, just reflecting back into these Covid times, we have been working a lot with the local government here, but at the same time sharing what´s happening with the…like the corona app was launched in Germany just a couple of days back, also sharing those things and seeing how best some of those things can be brought back into regions, like [country]. Or when the Covid crisis started, [organization´s name] also open up a lot of [products] completely for free for our customers. This is also something that we discussed in the [ION] and then we brought this back into [country] and offered it also to [geographical area] costumers across the [geographical area], so they can also leverage it. So, there are lots of things where things that are discussed globally can be brought back to a specific country or even regions, I would say.

Researcher: Ok. Thank you! Now I would like to go little bit deeper in order to understand the dynamics inside Network. Which role do different values play in the achievement of the network´s goal?

Interviewee F: I think it is about…if you ask me the beauty of the [ION], it is a great team of really capable individuals coming together, who know that the more we share and understand from each other, the best it is for the back for all locations, because when you share an idea you´ll of course say: "Hey, that may not work in [country] because we have a work council". Of course there are nuances which are very country specific, but I think for us to be successful we have to be very open, we have to be very collaborative, we have to trust each other as leaders and also benefit from each other, learning or mistakes, or "hey, I have already tried this, it didn´t work", maybe you want to take this as learnings. And I think that is the key essence in terms of values that again translate into collaboration, teamwork. Trust becomes also very important for the success of the network.

Researcher: And for what concerns your personal view, so you as person, how do you evaluate this diversity in terms of perspectives and values that exist within the [ION]?

Interviewee F: What exactly do you mean? Can you elaborate a bit more. I saw that questions, but I was not sure if I understood that, maybe you can explain it a little bit better.
Researcher: Ok. The [ION] is characterized by diversity because there are many [subsidiaries] around the world. How do you evaluate this diversity? What is your opinion about this diversity? Diversity in terms of culture, values, perspectives, what people think. For example, [country of Interviewee F] has values and a culture, [another country] has another one, so there is a lot of diversity within the [ION].
Interviewee F: I think if you ask me the [ION] is one of the most diverse teams across [organization´s name], we are naturally so, we´re a compressive team that is representing each country and there are also many nations in it itself, because you have representatives from every country in there, which makes it so unique and which makes it so interesting. This is also one of the aspects of my job that I really love that. There is so many perspectives and like somebody in [country] giving you one perspective, somebody sitting in [city] giving you another perspective, someone sitting in [country] giving you a different perspective. I think that is a great team to kind of also show how having diverse views helps and kind of taking forward the success for teams. I spent eight years of my live working in [country] and only in September moved back to [country]. And also for me it is very interesting to have this two heads culture. I have still [country where Interviewee F lived] head and [country where interviewee F is living] head (laugh). So, I also see things differently, which makes the whole very interesting for me. I think this is the same when you come together in the team as well, where we have MD from [country] sitting in there with specific views. I find that whole thing super fascinating and I think it is a great team where the values of diversity can be looked into even more detail, I wouldn´t say the values exactly, the success of diversity or having diverse teams can really be looked into, because I think we are so different people but coming together on a common goal.
Researcher: Yeah. And the fact that you lived in [country] impact on the way you run your [subsidiary]?
Interviewee F: Yes, it did, there is no doubt about that. There are some, many things which… I think it helps also the individuals…Fundamentals things, small things, being on time for meetings, being quite discipline when it comes…Also following up actions that were defined. In [country of the subsidiary of Interviewee F] I see a lot of passion in people which is great, but you need to channelize that in concrete outcomes, it is not just about saying: “Yes, we can

do everything", but you need to use this energy and translate that into concrete outcomes and I think that´s also very important and that is also something that I bring back from [country where Interviewee F lived] stile home, we have a home stile back there. I keep switching and at the same time if I look around, if I was sitting in meetings in [city] many times people are like "we cannot do that"[74], that was always like "c´mon, that´s too complicate" and I need to think till the moon and come back for something to work that I don´t see here and that´s is very liberating that you come with an idea an there are five people to say: "Yes, we can do" (laugh). I think we can strike a good balance between the two cultures. I think we can see extraordinary results for [organization´s name]. And that´s what I am very passionate about doing as well.
Researcher: Ok. Thank you. Are you able to identify one or more common points in terms of values among all MDs of the [ION]?
Interviewee F: Yeah, I think I told you a couple of the values. I think what I see is also a lot of collaboration. I mean, the basis of our success is bringing together. The whole point is really how can we share some of the things we are doing in a particular location with others, how can we cascade the strategy into the execution, how we look at talent acquisition. So, for all these aspects to be successful collaboration becomes absolutely fundamental. Trust again, I told you, is also important and also playing on the strength. I think it is also important to understand that every location has a strength, like [country]. If you ask me what is the strength, we have really extremely good [employees], and this is also a huge strength. And again, in terms of success, the network itself it is really how we can come together, share this, understand where some of challenges are and how we can come together, maybe when sometimes use some of the experts from one location to also support another location and so on. There are some of the core values I think which I have seen in my last months within the [ION]. And again, I would also say very friendly and open mind people, which I also appreciate very much. It is not like "oh, I am the best and I keep everything to myself", that´s definitively not the atmosphere I have been experiencing. I guess it is also because we have a very good leader in [name], who is also very similar [to interviewee F], he is from [country], lived twelve years in [another country], then moved to [another country] and I guess this also brings out the best in people.

[74] In the original transcript, the sentence „we cannot do that" was not in English. Here it has been translated.

Researcher: Yeah, thank you. Talking about competences: What kind of competences do you believe a [subsidiary] MD should have in order to be able to act in this context?
Interviewee F: First and foremost, I think it is important to be a person who connects with the people. It is super important that you bring together the people on a common goal for the [subsidiary] and to create an identity for the [subsidiary], which translates into very strong leadership qualities where you are able to get together people on a common goal. Also be able to get them motivated kind of behind of that common goal. That´s first and foremost. The second thing is…You need to understand the strategy. If you don´t understand the strategy you completely lost when you talk to people. And specially for a [subsidiary] like [country of Interviewee F], I told you that we have the entire [organization´s name] product portfolio and it is also important that you when you go into… I do a lot of visits with the teams. And when you go and talk to the people you need to be able to relate with what they do, right? Otherwise, you are just talking some high level stuffs, and that I think make a huge impact on being able to relate the company strategy concretely to the individual who´s with you. And solely understanding of [organization´s name] strategy and how that translates and how that mapping is also very important. And if you ask me the third important thing is communication, right? You need to be able to communicate to all levels of the organization. And communicate not just within the organizations but also externally within the region you represent, because you represent [organization´s name] for that location, which means, if you look at my calendar, lot of my time is also spent talking to costumers, a lot of my time is spent to talking to the government organizations, like [name of an organization] is an industry body in [country] where the top [sector] companies are coming together, deliberating on some of the regulations, measures that we are taking and I represent [organization´s name] at that body or I work with the [country-country] chamber of commerce where we have more than 4.500 [country of the headquartel] companies who run their own pressure also out of [local country] and I am part of this board there. So, it has to be a person who, of course, understands deeply the strategy, but it is also somebody that can carry the [organization´s name] brand, and I think that´s very important. And who´s also able to build those relationships with the field organizations, because it is not just that you run [the subsidiary] with close eyes, but you have to have that connection with your field or organization. For example, I´m very grateful to have a very good relationship with [name], who´s the president of the [product] market unit, who´s the [local country] market head from the sales side. And this

also helps teams to be closely interlinked with all the products that are going to market, how do we sell, how do we work with costumers and there is that no big disconnection between development and costumers' access. And this, I think, is super important for any location, because each of us are like mini-CEO for that location, right?

Researcher: And how do you think these competences could be developed?

Interviewee F: Yeah, everybody…We all have to have this mode of constant learning. That is something that I believe. I mean, every day we learn, and I think as long as we have that attitude or, how we call it, keep an open mind to learn and not blocking yourself from learning, I think that is an important thing. In that sense each of those competences that I talked about like leadership or strategy translation or working with the industry bodies or working with costumers or working with the market unit or working with some of the start-ups. I think it is not we are at the best, we come back, we learn, we have to constantly keep our, how we call it, you have to be on the top of your game, which means, which translates into, you come back, you do your homework, you talk to people, you share ideas, you learn from them and bring it back right? I think that´s a constant cycle which helps us to be successful, at least helps me be successful in what I am doing or try to be successful in what I am doing.

Researcher: And which characteristics do you think that someone that has an open mind to constant learning has?

Interviewee F: Which are some of the characteristics?

Researcher: Yeah!

Interviewee F: Like I said, that is itself a characteristic that you have an open mind, I mean only if you are open to new ideas and don´t block yourself I think that is so important. I think it is important that you shouldn´t hesitate going across the organization both vertically and horizontally. Because the perspectives that you get from people are so different, and I think if you are able to very quickly connect dots across these perspectives that´s when the beauty happens, and I am always seeing that. If you just talk to senior leadership team of 45 people that´s really not enough, you have to talk to a diverse set of people and then I think that the smart thing is to be able to connect the dots and come up with those outcomes. And I always believe that you can do that when you look also transformative outcomes that were not probably part of it before.

Researcher: Ok. Thank you. Now I would like to turn from the network to your professional relationships with individual colleagues. So, aside from these institutional meetings in the context of the [ION], are you in contact with other

MDs on a regular basis, so via email, call, face to face, the medium is not important.
Interviewee F: No, actually no, regularly not, every now and then I reach out. Like recently I was reached out by [name] who´s MD for [another subsidiary] because he was able to get the web page of [subsidiary] out there and when I took on this job I was asking the folks: “Hey, we don´t have an external web page for [subsidiary of Interviewee F]”, and this is because the previously head said: “bla bla bla”. And then [name], I think he took the role even few months after me, I think it was in December, right before Christmas and I: “hey [name], how did you do that? (laugh). So, things like that. I saw recently we have a new MD for [another subsidiary], [name] who asked me if I can have a regular meeting with her, and “yeah, absolutely”. But it was more how reach out to me I have to admit in all honest. So, for me it is more on demand basis that I reach out. But what I of course do is I am also in connection with lots of MDs from [country of the headquarter] companies who are located in [country of Interviewee F], that´s a network I regularly use because I also learn about…Because I was bit away from [local country] for eight years, so there is a lot of learning involved to understand some of the operative procedures and local guidelines and regulations. So that´s a network that I use more extensively, I should say. The other network, [ION], I use when I need it.
Researcher: So, it depends on your needs?
Interviewee F: Yeah, depends on my needs.
Researcher: So, there is no one that is, let´s say, special?
Interviewee F: No, they are all specials, I would say. I said, again it depends on the topic.
Researcher: Ok. A last question: I know that there is a value within [organization´s name]: “Build bridges not silos”. What does “build bridges not silos” mean for you?
Interviewee F: Yeah, I think I gave you one example of the [initiative mentioned earlier]. Like I told you, when I came here, maybe I just remember a bit to give you more context. Before I took on this role my role was to drive the [initiative] for [organization´s name] on behalf of the executive board. So, every Monday we had meetings with the executive board talking about where we are. So, one of the challenges that I faced in my previous role was really getting people across the organization, across time zones to be able to come with and delivery on a common goal. And then I took on this role, I came to [country] in September and I was like “oh my god, we have every LOB (line of business) here”. So, one thing when [name] and [name] were here back on September last year to kind of

induct me into this role, I told them: “Hey, actually we should have driven the [initiative] in [local country] because here we have all the experts in one location, in one time zone. And they: “Oh, that´s a good thing”. And for me that´s a concrete example of how you break those silos, because again, these people can remain in their areas, but the common goal would be the execution. In fact, the next call that I will have at 15:30 with [name], who´s the CEO of [name], is exactly on this: How we can turn it into action. Because again, here it is really people working on the areas, but it would be so easy for [organization´s name] to bring together in one location to kind of delivery on that common goal. And for me that´s a very clear concrete example on how you break silos for a common purpose, right? And again it does not mean reorganizing people or anything, they can stay where they are, but they have a common vision, they have a common target and they can work towards that. And I think that if you make that possible for people by creating concrete outcomes, then you tell them, you explain to them what they need to do, they will do it.

Researcher: So, in your opinion “build bridges not silos” has a meaning within [subsidiary of Interviewee F], so it is not related to [ION] but to [location]?

Interviewee F: No, I gave you one example of [country]. If we translate that into the [ION] you can also work on some of the strength. As I told you, each location has a strength, right? And for me it is not about looking at a country through that filter, but to say: “Ok, now we bring together these strengths”. So, you can apply that same context also in [ION]. For example, if a say like, I mentioned later on [another subsidiary], the best when it comes to the whole [organization´s name] [product]. Now, imagine that any location in the world can, if they are looking for expertise in [product], they know that…I mean I only got to know that when I took on this role, despite having spending a long time at [organization´s name], but I´m just saying for me breaking these silos is translating that knowledge across every level in the organization so that people don´t just look around them but they know “hey, go to these people”, then I can get immediately support when it comes to [product]. Hundert of such examples where we can break the silos that exist today.

Researcher: Thank you very much for your insights. It was everything from my side. Do you have further questions?

Interviewee F: I am really looking forward to your analysis and how best we can bring it also back into practices. Because I think this is good that we look at organizational change and I think it is one of the topest thing across a larger organization like [organization´s name]. Because it is easy to define high level goals, but how you translate that through huge organizations and that´s a lot of cultural change, organizational change, which is very painful, you need time, you need dedication and a lot of effort. So, I am happy that you´re doing this and I am looking forward to the results of your work.

Researcher: Thank you very much!

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