Journal of Business Research 176 (2024) 114577

Contents lists available at ScienceDirect

Journal of Business Research

journal homepage: www.elsevier.com/locate/jbusres

Beyond social enterprise: Bringing the territory at the core

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ARTICLE INFO

Keywords:
Social enterprise
Territory enterprise
Institutional entrepreneurship
Organizational form
Hybrid organizations
Life story
Process analisis

ABSTRACT

Over the last two decades, research on social enterprises has expanded significantly, with special focus on the creation and scaling up of these organizations. Yet, the question of how social enterprises mutates over time has been scarcely analyzed. Based on a single case study of the Archer Group located in Romans-sur-Isère (France), we wish to understand why and how a well-identified organizational form (a social enterprise) incorporates the territorial dimension to transform into a more non-mainstream form (i.e. a territory enterprise). We will examine both the 'turning points' (Abbott, 2001) in the evolution of the organizational form as well as the transformation processes implemented by an institutional entrepreneur to achieve these evolutions. Our analysis sheds light on how a social enterprise gradually transforms itself to better contribute to the sustainable development of its territory and the mobilization of local citizens. It also shows that a different form of local development 'by and for local people' is possible. This article highlights the crucial role of the territory in the strategy and objectives of social enterprises and contributes to the reflection on place sensitive research for social enterprises.

1. Introduction

Traditionally, social enterprises are considered hybrid organizations pursuing a dual mission of financial sustainability and social purpose (Battilana et al., 2022; Doherty et al., 2014). Although the definition of social enterprise is highly debated (Sakarya et al., 2012), 'Social enterprise is the label normally applied to not-for-profit organizations which operate commercially' (p 3). Other authors focus on their mode of governance (Sepulveda et al., 2020; Petrella et al., 2021) and their social and/or environmental impact (Lacroix & Slitine, 2019). It is only in a more marginal way that some considerations appeared to illustrate the social, economic and environmental contribution of social enterprises to local and regional development (Buratti et al., 2022; Haugh, 2005). According to Kim and Lim (2017) 'Social enterprises have positive effects that influence local and regional development by satisfying local and regional needs, creating jobs in the community, developing relational assets in business processes, or restoring community solidarity'. In these reflections, the questions of territory and local development are generally considered as a positive consequence of their main activity, which remains focused on the capacity of these organizations to respond to a specific social or environmental issue.

In contrast to this dominant approach of social enterprises which remain mainly focused on their own development to promote their social or environmental impact (Diaz-Sarachaga & Ariza-Montes, 2022; Bacq & Kickul, 2022), there is a growing awareness of the importance of a place-based approach to enterprises (Audretsch, 2015; Baranova et al., 2020). In this line, we observe in France the development of a new type of entrepreneurship, with organizations calling themselves 'entreprises de territoire' (territory enterprises). These territory enterprises state that their primary mission is to be at the sole service of local economic and social development. Their ambition is to play a key role in setting up and structuring sustainable production and consumption sectors to benefit the local population (development of local sustainable agriculture, launch of green energy production activities, revivals of recycling and bottle deposits, etc.). More broadly, these organizations seek to transform economic and social relations to develop local solidarity links (cooperation between local SMEs, social living spaces for the inhabitants, etc.). They thus adopt a territorial strategy that goes beyond the borders of their organization (Chevalier, 2016; Slitine & Vuotto, 2023). According to Henrion et al. (2019), it is much more a 'specific concept that refers to the way in which entrepreneurial dynamics are constructed in a region and for a region' (p. 5). Beyond isolated initiatives, players who claim to be "territory entrepreneurs" structure themselves to consolidate their practices and assert their identity and specificities. Thus, the Coorace Federation, which brings together 591 organizations mainly from the social and solidarity economy and

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https://doi.org/10.1016/j.jbusres.2024.114577
Received 15 February 2023; Received in revised form 30 January 2024; Accepted 10 February 2024
Available online 4 March 2024

employs over 44,308 employees, became the federation for 'territorial social enterprises[1]' in 2020 (Coorace, 2023). In parallel and since 2016, the aim of the Start-Up de Territoire (Territory Startup)[2] initiative has been to mobilize all local stakeholders to develop ecosystems (Audretsch et al., 2019) that are favourable to the creation of territory enterprises.

This leads to wonder in what way the territory enterprise can appear as a new organizational form in the sense of 'an archetypal configuration of goals, practices and identity claims that mark members out as belonging to a particular category of organization' (Tracey et al., 2018).

To better understand the emergence of the territory enterprise as a new organizational form that incorporates the territory in the core of its identity, we need to observe how it has been created over time, from an existing structure. Surprisingly, there is little research on the transformation of an initial organizational form into a new one. To the best of our knowledge, only Reficco et al. (2021) provide such a study, by focusing on the integration of an economic logic in a nonprofit organization (NPO).

By adopting a process vision (Langley, 1999), we wish to understand why and how a well-identified organizational form (a social enterprise) incorporates the territorial dimension to transform into a more non-mainstream form (i.e. a territory enterprise). To this end, we propose to open the 'black box' of the various periods of transformation of the Archer Group (SAS) founded in 1987 in Romans-sur-Isère (France). The Archer Group is one of the main local economic players, employing more than 1,000 people a year in the Valence-Romans area in a wide variety of sectors (transport, logistics, industrial subcontracting, etc.). It is also one of the forerunners of the territory enterprises dynamic in France. We will examine both the 'turning points' (Abbott, 2001) in the evolution of the organizational form as well as the transformation processes implemented to achieve these evolutions. The analysis of this single case study sheds light on how a social enterprise gradually transforms itself to better contribute to the transformation of its territory and the mobilization of local citizens. It also shows that a different form of local development 'by and for local people' is possible.

After a review of the literature to present the state of the art on organizational forms and the key role of the institutional entrepreneur in their evolution, we describe our case and our ethnographically inspired methods. In our results, we identify the 'turning points' that a social enterprise undergoes as a result of the action of an institutional entrepreneur to transform its territory. Our research contributes both to the literature on organizational forms and on social entrepreneurship and their relationship to the place.

2. Literature review

2.1. Understanding organizational forms

Due to the abundance of research, reflections on organizational forms are fragmented and not unified under a single theory (Palmer et al., 2007).

The organizational form is 'an archetypal configuration of goals, practices and identity claims that mark members out as belonging to a particular category of organization' (Tracey et al., 2018, p. 1627). Our literature review identifies three fundamental elements for defining the concept. First, organizational forms are characterized by specific practices. For Stinchcombe (1965), these are 'imprints' that remain constant over time. Second, for there to be an organizational form, the authors emphasize the importance of building an assertive collective identity (Perkmann & Spicer, 2007). Similar organizations share similar characteristics and highlight their specificities. Finally, audience recognition is necessary for a form to be acknowledged as such. Thus, for Fiol and Romanelli (2012), organizational forms are 'classes of organizations that audiences understand to be similar in their core features and distinctive from other classes of organizations' (p 597).

Many studies have focused on the emergence of new organizational forms. The literature tries to understand how these new forms are created, and why certain new organizational practices are recognized by audiences while others do not (Fiol & Romanelli, 2012). Indeed, new organizational forms must contend with the 'liability of newness' as conceptualized by Sinchcombe (1965). Therefore, the work of legitimizing new forms takes on particular importance (Greenwood & Suddaby, 2006) to enable a 'perceived appropriateness of an organization to a social system in terms of rules, values, norms and definitions' (Deephouse et al., 2017, p. 32).

2.2. An institutional theory perspective on new organizational forms

From an institutional perspective, an organization is a form of institution (Mutch, 2018). On the question of how new forms emerge and are gradually recognized as being accepted social facts, neo-institutionalist researchers highlight the decisive role played by institutional entrepreneurs (Battilana et al., 2009; Tracey et al., 2011). According to Maguire et al. (2004) institutional entrepreneurs are organized actors 'who mobilize the resources necessary to create new institutions or transform existing ones' (p. 657). The focus is primarily on the strategies of actors to change institutional arrangements rather than just comply with them (Hardy & Maguire, 2017).

Perkmann and Spicer (2007) offer a summary of the different actions of institutional entrepreneurs to bring about and disseminate new organizational forms. They demonstrate that this is a 'multidimensional' activity that involves interactional, technical, cultural and political projects. Tracey et al. (2011) illustrate the multi-level dynamics of institutional entrepreneurs. According to these authors, institutional entrepreneurs intervene at the *micro* (individual) level by formulating the problem in an original way and then by developing a solution through reflection based on alternative forms but also at the *meso* (organizational) level by building an organizational form and theoretically explaining why this particular form makes sense as a solution to the problem that it has redefined. Finally, action at the *macro* level (society) makes it possible to link to relevant social discourse and to align with players with high legitimacy.

More generally, studies show that the emergence of an organizational form requires specific institutional work (Zietsma & Lawrence, 2010) that can be summarized around three main dimensions. First, it is necessary to assert one's identity and to articulate 'a clear defining collective identity story that identifies the group's orienting purpose and core practices' (Wry et al., 2011, p. 449). This is how the actors use their identity to influence institutions more broadly (Jones & Massa, 2013). This involves creating stories which emphasize similarities within an entrepreneurial group and theorize the values and particularities of identity compared to other collective identities. Second, many analyses converge to affirm that one of the qualities of the institutional entrepreneur is its ability to bridge several worlds. In this respect, the concept of 'field switching' (Perkmann & Spicer, 2007) emphasizes the necessary ability to navigate between different institutional fields. In addition, the institutional entrepreneur is 'amphibious' and must have the ability to occupy positions of influence within disparate social spheres (Powell & Sandholtz, 2012). This should enable it to foster cooperation and reconcile the positions of heterogeneous players. Third, relations with leading players, such as renowned universities, play an important role in institutionalizing new organizational forms (see for example David et al., 2013) on the emergence of management consulting as a new form of organization).

Concerning more specifically social entrepreneurship, previous studies that explore the formation of new organizational forms in social enterprises often focus on understanding how institutional entrepreneurs accommodate dual social and commercial processes (Wry &

[1] https://www.coorace.org/page/pr%C3%A9sentation-fran%C3%A7aisanglais.

[2] https://startupdeterritoire.fr/.

Haugh, 2018). For example, Tracey et al. (2011) investigate how social enterprises are transformed from traditional NPOs by incorporating commercial processes within social organizations in the first place. In particular, institutional entrepreneurs focus their attention on constructing businesslike working processes and supporting structures within traditional NPOs and developing capacity for managing businesslike operations (Ko & Liu, 2020). For their part, Bruneel et al. (2016) recommend paying attention to the governance of the tension between competing demands inside as well as outside the organizations. Although this research line has generated valuable theoretical insights to understand how social enterprises are transformed from traditional NPOs by incorporating commercial processes within social organizations in the first place (Ko & Liu, 2020), one area which remains relatively unexplored is how social enterprises incorporate the territory dimension and transform in an innovative organizational form. Our contribution aims to answer this question and provides new insights into both the emergence of organizational forms and the gradual construction of the action of the institutional entrepreneur in this respect.

This reflection is part of a wider debate on the effects of entrepreneurship on society (Caliskan & Lounsbury, 2022). Entrepreneurship is now widely regarded as a source not only of economic growth, but also of social and even ecological development (Weiss et al., 2023). However, some researchers argue that existing organizational forms are inadequate to deal with the complexity of major contemporary social problems (Ferraro et al., 2015). There is therefore a call for the invention of innovative organizational forms to tackle grand challenges (Markman et al., 2019).

3. Methodology

We used an ethnographically inspired methodology (Takhar-Lail & Chitakunye, 2015) combining various sources of data over a long period of observation.

3.1. Research context

To analyze the question of the emergence of the territory enterprise as a new form of organization, we propose to use an in-depth longitudinal single case study of the Archer Group (SAS). The case study approach makes it possible to investigate new and complex subjects in detail in their specific context (Yin, 2014) with the aim of 'comparing theory with the empirical world' (Piekkari et al., 2009).

The Archer Group can be considered a 'revealing case' (Yin, 2014) which provides an opportunity to observe and analyze a phenomenon that was previously difficult to access. Indeed, founded in 1987 in Romans-sur-Isère (France), as a work integration social enterprise (WISE), it progressively evolved to become one of the leading French 'territory enterprise' (Chevalier, 2016). The case is geographically located in Valence-Romans but has a wider recognition both across the whole region and at the national level.

3.2. Data collection

To conduct a longitudinal study of the case, data was collected in several stages. From 2010 to 2014, one of the authors engaged in regular exchanges with the CEO of the Archer group and conducted additional interview with various stakeholders in the territory. This allowed for a detailed understanding of the organization's evolution, which was documented in fild notes and formalized in a general public book published in 2014 and updated in 2017. For this article, we make secondary data analysis (SDA) with qualitative data (Chabaud & Germain, 2006). This allowed for a detailed understanding of the organization's evolution, which was documented in field notes and formalized in a general public book published in 2014 and updated in 2017 (Barthélémy et al., 2017). For this article, we conducted a secondary data analysis (SDA) using qualitative data. SDA involves investigations where data collected for a previous study is analyzed – either by the same researcher or different researcher – to explore new questions or use different analysis strategies that were not a part of the primary analysis (Ruggiano & Perry, 2019). During 2014 and 2018, one of the authors was individually engaged in observant participation. In particular, he attended the Archer Group's annual general meeting and other public events as a guest or speaker. Between 2018 and 2022, an in-depth interview process was conducted to understand the transformation of the group into a territory-based company. During this phase, we conducted a life story of the founder and current CEO of the Archer Group, Christophe Chevalier. A total of 14 h of conversation in interviews was fully transcribed; this was extended by informal conversations. This method makes it possible to study actions over time by capturing the key elements of the subject's individual practices, breakthroughs and life trajectories. For Bertaux (2016), a life story starts from the moment a person tells a researcher about an episode in their life experience in the form of a narrative. The act of 'telling' is crucial because it means that the subject's discursive production has taken a narrative form by incorporating explanations, descriptions and evaluations in a diachronic sequence. The life story is of interest because the subject not only tells a story, but also creates space for self-analysis and develops reflexivity (Bah et al., 2015). A strong relationship of trust between the researcher and the narrator is essential for a life story (Johansson et al., 2014). To enhance the validity of the results and the quality of the analysis, we triangulated the data collection methods by incorporating multiple perspectives on the research object (Atkinson, 1998). To this end, we conducted 24 additional interviews with players connected with the Archer Group (the mayor of Romans-Sur-Isère, the economic services department of the Valence-Romans conurbation, the representative of the Coorace business federation, and consultants), as well as with people close to the Archer Group (the management team and shareholders). These one- to two-hour interviews were fully transcribed.

We also carried out various field observation visits, like the Journée Start-Up de Territoire (territory start-up day) in 2018 and for the Up'-Percut Forum in 2020 and 2022. Furthermore, our ease of field access made it possible to collect secondary data on the enterprises. We gathered documents for external use (books, activity reports, press reviews), as well as internal and confidential documents (emails sent to the directors of the Archer Group, internal reports, in particular for the tax authorities relating to the Group's research policy, the response to the 2018 call for proposals from the Banque des Territoires, etc.) (see Table 1).

3.3. Data analysis

In analyzing the data, we followed an iterative process, traveling back and forth between the data, the literature, and an emerging structure of empirical categories, which we developed through cyclic reading and rereading of the material (Miles et al., 2018). Our attention focused more specifically on two levels of analysis. First, at the organizational level, how the organization changes into a territory enterprise in stages, with a special focus on the 'turning points'. Second, at the individual level, how the CeO of the social enterprise gradually structured his actions and organization to convert into an institutional entrepreneur?

Then, we combined two analytic strategies.

First, a thematic analysis (Braun & Clarke, 2006) was conducted on our material.To this end, we coded the transcribed text of Christophe Chevalier's life story using the method detailed by Saldaña (2016) and with the help of *Altas.ti* software. At the end of the initial 'open' coding cycle, which closely followed the the text and verbatim reports, we categorized the codes according to the various dimensions of organizational form outlined in the literature review: specific practices (such as cooperation with local actors and the ability to mobilize different local stakeholders) collective identity (including the creation of communities of practice and mobilization of actors at the national level) and

Table 1
Synthesis of data collection.

Interviews and Life story	*Life Story* Christophe Chevalier, CEO of the Archer Group and founder of SUTRegular follow-up interviews (8 interviews)	14 h – 162 pages of verbatims
	Archer management interviews Raphaële Bénilan d'Hérouville, Deputy Director of the Archer Group François Vercouten, Deputy Director of the Archer Group Gilles Moncoudiol, Chairman of the Management Board Emmanuelle Benoît, Communications Manager Emeline Macard, training officer	6 h30 h 89 pages of verbatim
	*Interviews with the FabT / Start Up de Territoire actors*Michel Nicolas, director of the Fab T (2 interviews) François Monterrat, Fab T project manager Carinne Fleury, Fab T support manager René Buttin, Fab T partnership manager	4 h40 h — 57 pages of verbatim
	Interviews with local elected representatives Nicolas Daragon, Mayor of Valence and President of the Valence-Romans Agglo Laurent Monnet, Vice-President of the Valence-Romans Agglo Marie-Hélène Thoraval, Mayor of Romans-Sur-Isère	3 h35 – 42 pages of verbatim
	Interviews with Agglo Valence-Romans employees Mourad Hader, Director of the Economy Department Marie José Georges, Communication Director	2 h15 – 26 pages of verbatim
	*Interviews with Start Up de Territoire project leaders*Ivan Collombet (La Ceinture Verte)Maryline Chasles (FabLab Romans)Cecilia Garayt (Potagers de Ouf)François Xavier Chambost (Bed in shop)Noémie Volle et Céline Duffy (Recyclerie — Refabrik)Solen Bourgeat (Cocagne/Courte Echelle)	6 h — 76 pages of verbatim
	Other interviews Eric Beasse, General Delegate of the Coorace federationPierre Langlade, Director of the GDID association group (Bouches du Rhône) ,Armand Rosenberg, Director of the ValHorizon group (Ain)Laurent Pinet, Managing Director of the ISACTYS group (Isère)	6 h35 – 78 pages of verbatim
Observant participations	Interventions and animation of conferences organised by the Archer group and the FabT since 2014 Participation of one of the authors in the drafting of the call for projects of the Banque des territoires (Territoire d'Innovation Grande Ambition - TIGA) in 2019	
Non-participant observations	Several immersion stays within the Archer group over the period 2010—2022 Participation in Start Up de Territoire events since 2016	
Documents	Access to numerous internal and external documents, including confidential ones (cf. response to the Territory Bank's call for projects) Books written by the main actors on SUT, Archer…	
Reuse of secondary data	*Livre Économie qu'on aime, Editions Rue de l'Echiquier, 2014 réédition 2017* 12 interviews from a sample of stakehoders of the Archer Group - interviews initially conducted in 2010 then actualized in 2013 and 2016	

recognition by different audiences (including national and local public authorities, local residents, and economic partners).

Second, we used the 'temporal bracketing' strategy (Langley, 1999) that involves decomposing timelines into segments that are used for comparative analysis. To this end, we drew up a chronological narrative report on the development of the structure over the 1987–2022 period. This allowed us to delineate the major stages in the development of the Archer Group by paying particular attention to moments of change and transformation of the organizational form. We then compared the different temporal stages to identify common points and developments. We also produced a detailed graphic representation by identifying the main stages in the evolution of the organizational form and the main actions of the institutional entrepreneur. Through the conceptual prism of institutional entrepreneurship, we identify different actions that are developed over time to bring about this new organizational form. Coding using *Atlas.ti* software helped us identify the 'micro' processes involved in the actions of the institutional entrepreneur. We were particularly interested in the elements that led to 'turning points' (Abbott, 2001) in the construction of the territory enterprise. According to Abbott (2001), 'Turning points are best envisioned a short, consequential shifts that redirect a process. The concept is inevitably a narrative one, for a turning point cannot be conceived without a new reality or direction being established, a judgment that requires at least two temporally separate observations. Not only sudden changes are turning points, but only those which are succeeded by a period evincing a new regime' (p. 258). Indeed, certain changes radically alter the direction of a process and, as such, deserve special attention. This irreversibility manifests itself in different ways. In particular, it can be seen when a bifurcation is not confined to a single sphere of activity, or on a single scale, but spreads across various fields and levels, 'contaminating' them by causing them to react in turn, in a cascade. The nature of the transformations that take place during a bifurcation can only be truly understood if we break down very precisely what happens during this period, in the form of a succession of distinct but highly articulated phases.

In addition, our analysis focused on the necessary arbitration and practical organization of the institutional entrepreneur, who is also a company director.

4. Findings

In the first part, we reconstitute the main period of evolution from a social enterprise to a 'territory enterprise'. We have paid particular attention to 'turning points' (Abbott, 2001), which are particular moments of recomposition that lead to a change of direction in the process. In the evolution of the organizational form of the Archer Group, we note the growing importance of the territorial dimension in the strategy and the actions of the organization.

The three key dimensions of the institutional entrepreneur's work to facilitate the evolution of this organizational form over time are then identified.

4.1. From a social enterprise to a group of local economic development

- ***1987–1998: A work integration social enterprise in response to the region's crisis***

In the early 1980s, much of the local economic activity in Romans-

sur-Isère still depended on a dozen or so shoe companies. The early 1990s marked the end of this economic landscape. Under pressure from foreign competition, most companies closed their doors. It was in the context of this economic and social crisis (25 % unemployment in the working population and 40 % in priority neighborhoods) that Georges Tourdot, the former director of the Mission Locale de Romans, created the Archer Association in 1987. It was initially a social action association set up to provide a comprehensive response of those most at risk of unemployment and exclusion.

In 1987, national laws were passed recognizing recognizing integration through economic activity. Archer then became an intermediary association, a form of a work integration social enterprise. From 1987 to 1991, an initial strategic development phase started, characterized by significant growth in social inclusion activities coupled with a highly entrepreneurial approach. The Archer Group's took a holistic approach, providing individualized routes to employment to tackle social problems related to housing and health. While also offering paid employment to address economic difficulties. Additionally, they offered paid employment to address economic difficulties.

- ***1999–2006: A social enterprise that adapts to the changing needs of its territory***

At the end of the 1990s, Archer's managers became aware that the 'crisis was not temporary but rather a lasting and profound change in our economic fabric' (Gilles Moncoudiol, board member of the company). They observed that the social issues in the region called for complementary responses. As Christophe Chevalier puts it, the previous mechanisms of inclusion in the labour market remain "essential, but not sufficient, particularly in times of rising unemployment. They may change the order of the winners, but they don't really create jobs". This awareness of the limits of integration led to a second phase of strategic development. The aim was then to become a player in local economic development. Therefore, saving and creating jobs became the central focus of the organization. It was no longer just a question of finding emergency solutions to cope with the massive relocations in the region, but of putting the organization's action into a longer-term perspective. According to François Vercouten, Deputy Director of Archer, this turning point allowed the organization to move 'from a defensive option to a proactive version of our action at local level'. In 2005, Archer articulated this change in its Charter; it moved away from a 'social emergency response' approach to a more structured response based on saving existing businesses and creating jobs. The organization then focused on taking over businesses, industrial subcontracting and seeking alternatives to offshoring.

Rapid changes within Archer led the management to rethink its governance and legal structure. In 2007, a major evolution was made with the creation of a nonprofit simplified joint stock company (or SAS in French). The SAS had three objectives. Firstly, it aimed to align the Group's operations with tax and legal requirements to avoid taxation resulting from commercial activities. Secondly, it aimed to strike a balance between ensuring Christophe Chevalier's broad capacity for action as CEO of the Group and implementing effective checks and balances on the Supervisory Board in terms of governance. Lastly, the creation of the SAS permit to open up the capital to local residents, social investors and representatives of the social economy. This citizen entrepreneurship, which initially had 15 shareholders (now 125), became a 'powerful tool for mobilizing the region (…) we were social entrepreneurs who were starting to become entrepreneurs for the territory' (Christophe Chevalier).

4.2. Developing to become a territory enterprise

The Archer Group has been classified as a territory enterprise since the early 2010s[3]. However, it was not until 2015 that this organizational form became a concrete reality.

- ***2007–2014: beyond the group, structuring a regional economic cooperation hub***

During this period, the Archer Group sought to seize all opportunities in the region to protect and develop jobs. It stepped up its actions to combat 'corporate losses' (due to bankruptcies or the retirement of managers) and business relocations. Aware of its inability to achieve this goal alone, the Archer Group changed its strategy to focus on cooperating with other economic and social players. This allowed the Archer Group to pool its skills other social enterprises and family-owned SMEs in the region to take over different companies (beginning with a business producing commercial samples and a joinery firm) and to save an industrial subcontracting business that was going to be relocated (subcontractors of Ford company for example).

These successive business creations and takeovers gave rise to around fifteen highly diverse hubs: construction, public works, green spaces, pallet manufacturing, personal services, temporary work, transport and logistics. In addition, the launch of a new shoe brand *Made In Romans* in 2010 gave out a strong symbolic signal and embodied the Archer Group's project with regard to revitalizing the economy of Romans, which had been the international capital of luxury footwear, and to revive its history on this occasion.

In 2007, the Group decided to structure the cooperation on the territory and created 'Pôle Sud'. This informal structure gathered actors of the social and solidarity economy (Regional Chamber of the social and solidarity economy, Coorace federation, NEF bank, microfinance institutions, etc.), as well as public services (like the national employment service). The aim was to define collectively new opportunities of economic development in the region 'in an entrepreneurial approach' (Christophe Chevalier). It is during this period that the conceptualization of the new organizational form is revealed. In a publication on the Group's 20th anniversary, in 2010, the organization emphasizes the term 'entrepreneur de territoire' which 'seems to us to be best suited to describe the positioning of companies that, like Archer, have chosen to work on the local development of employment from a company that itself produces in the region in which it operates'.[4]

- ***2015–2022: Mobilizing and Empowering the Citizens***

In 2015, the Group's Supervisory Board acknowledged a major strategic change by considering that it had achieved its growth objectives 'both in terms of its diversity of action, volume of action and geographical space' (Christophe Chevalier). Turnover had increased from 10 million to 21 million in five years and 2,000 people were employed by the Group each year. The Supervisory Board planned future premises in Valence, which would materialize in 2017 with 1,300 m^2 of space.

At this moment, the Group accelerated its conversion to a territory enterprise by opening up more to the citizens. This was embodied in the launch of 'Start-up de Territoire' (SUT), which consists of organizing hackathons intended to enable the emergence local entrepreneurial projects 'by and for' citizens. According to Sophie Keller, cofounder of SUT, the main objective of Start Up de Territoire is 'to support the creation of a new generation of territory entrepreneurs'. As a testament to the interest in the approach, the first evening event organized to

[3] Archer, une histoire romanaise. Group work published by the Archer Group under the direction of Pierre Juvin, 2010.

[4] Idem.

generate business-creation ideas in February 2016 brought together 250 people, then nearly 1,500 people in March 2018 (residents, local entrepreneurs, companies and networks of the social and solidarity economy, elected officials and agents of local authorities). Four axes were defined to select the projects: the economic axis, with the capacity to put in place a viable economic model that creates activity; the social axis, corresponding to a clear response to a social need that is poorly met; the ecological axis, by promoting the circular economy (reuse and recycling), to optimize resources, reduce the carbon impact and preserve biodiversity; and finally the territorial axis, corresponding to a territorial anchoring, participation in the collective dynamics of the projects and contribution to development (source: SUT methodology). Beyond the formal criteria, according to François Monterrat, project manager of SUT, one of the keys to the success of the projects lies in "the collective dynamic at the end of the creative evenings, which bring together all the players in the area. If, following these events, the local people are able to coalesce around an entrepreneurial dynamic, then we've won". In 2022, 50 projects were already created covering sustainable energy, recycling, short circuits, clean mobility, agro-ecology, re-industrialization and tourism. In September 2020 and 2022 to strengthen the growth of projects already created, the SUT events mobilized more than 2,000 people in the city of Valence.

Finally, in September 2019, the Archer Group created alongside Valence-Romans Agglo an Établissement Public Local Autonome (autonomous local public establishment), the Fab Territory or Fab T, to help structure the approach and continue to finance and support local project leaders.

4.3. Organizational transformation from an insider's perspective

Although Christophe Chevalier is not the founder of Archer, he has been at the executive management level since 1989. He is considered by all the local interlocutors as a key person in the evolution of the organization and its transformation into a territory-based company. In this sense he acts as an institutional entrepreneur (actors with sufficient resources to contribute to the genesis of new institutions in which they see 'an opportunity to realize interest that they value highly' – DiMaggio, 1988, p. 14).

We identify three main dimensions of the action of institutional entrepreneurs to bring about a new organizational form.

- ***Affirming a Vision for the Future of the Territory***

The construction of a new organizational form starts with a critical distancing from the traditional way of working. Quite early, Christophe Chevalier identified the problems associated with existing practices. From the beginning of the 1990s, and therefore a few years after the Archer Group's first experiments on integration through economic activity, Christophe Chevalier took a critical look at the relevance of his organization's action regarding local needs. In parallel, he affirms an identity and a vision of the world. He progressively constructs a different vision for the local development and justify new practices as a relevant solution for the territory. Christophe Chevalier stated on several occasions that 'we had a vision for the city, and we shared that vision of the city'. In the same vein, he often asserts that his ambition to 'change the world' with the central idea of 'taking over the economy and imprinting a new way of doing business'. He also draws parallels with other forms of engagement: 'Some people want to engage in politics to change things, we want to use our entrepreneurship power to transform our territory.'.

To affirm his vision of the world, he considers he must think of alternative vocabulary – beyond markets, firms, social economy or social inclusion – to capture how collective action is organized in situations of crises. In a complementary manner, Archer's CEO used artifacts to embody the ideas he wanted to convey. In this respect, the revival of the shoe industry in Romans-sur-Isère is an effective means of representing the Group's action in the region based on a concrete achievement. Or, to put it in the words of Christophe Chevalier: 'in the shoe, there's everything'.

- ***Mobilizing Locally Around the Project***

The second dimension that is gaining prominence in the evolution of the organizational form is the capacity of institutional entrepreneurs to 'cooperate with local stakeholders, whether public authorities, local SMEs, voluntary sector, and social and solidarity economy' (Christophe Chevalier). This is what the Archer Group's CEO calls 'operational cooperation' and therefore concrete cooperation based on a shared project. To this end, he stressed the need to start with small-scale actions to learn how to work together (for example in the case of industrial relocation actions, a few dozen jobs were initially concerned).

One of the most important opportunities to mobilize alliance in the territory was the preparation work of the French National Bank's call for projects in 2018. To mobilize resources for this new mission, the Valence-Romans conurbation and the Archer Group joined forces to respond to a call for 'Territoires d'Innovation' projects. In september 2019, the project entitled 'Valence Romans, capitale des start-up de territoire' was selected by the jury and was awarded €23 million to support the structuring and deployment of its approach. The stated ambition, thanks to this public support, was not only to develop local businesses, but also 'to provoke a tipping point in order to intensify the momentum and thus to move away from the margins to the center of the region with the aim of creating a real program for the productive recovery of the region.' This project set in motion by the Archer Group and the Valence-Romans conurbation and mobilized more than 50 different organizations from the region.

- ***Spreading the model beyond the territory***

Our analysis highlights the emergence of a final dimension of the work of institutional entrepreneurs to bring about a new organizational form: the desire to 'make a system' (Christophe Chevalier). Based on the 'Pôle Sud' experience, the Group worked with national players (such as the think tank Labo de l'ESS) to conceptualize the experience. This gave rise to the concept of a Pôle Territorial de Coopération Economique (regional economic cooperation hub) in France and cluster of social innovation in Europe – (European Commission, 2021). This concept was then adopted and deployed nationally by the Social and Solidarity Economy Act of July 2014.[5]

We identify several circles of communities of practice initiated by Christophe Chevalier. A first circle, called by Christophe Chevalier 'les compagnons de route' (the fellow travellers), has been gradually building up. Among others, the director of the GDID Group in the South of France and the CEO of the ValHorizon Group next to Lyon, implemented similar organizations in their region. Quite early, these leaders called themselves 'territory entrepreneurs' and regularly discussed projects and worked with the CEO of the Archer group. A second larger group was constituted when the director of the Archer Group was elected president of the Coorace federation in 2006. Historically, this federation was a regrouping of work integration social enterprises. Instead of trying to convince all members of the federation to adopt a more local development approach, Christophe Chevalier identified the

[5] Defined by the ESS Act of 31 July 2014, Article 9: 'Regional economic cooperation hubs are constituted by grouping together in the same region companies from the social and solidarity economy, within the meaning of Article 1 of this law, which join forces with enterprises, in conjunction with local authorities and their groupings, and research centres, in order to implement a common and continuous strategy of pooling, cooperation or partnership in the service of economic and social projects that are socially or technologically innovative and conducive to sustainable local development.'.

leaders most interested in the territory enterprise approach. He organized various learning visits that provide opportunities for various meetings between company managers who share the same desire to innovate in their relationship with the territory.

Finally, it is interesting to note that Christophe Chevalier has gradually become aware of the importance of formalizing practices and creating tools. 'At first, I thought it was enough to sit down with a manager over a good lunch to explain what we do. Today I realize that this is not enough. We need to formalize our experience in various methodologies and the role of research in this is indispensable.' (Christophe Chevalier). Therefore, since 2017, the Archer Group has been working with researchers from the University of Grenoble and from the Sorbonne Business School to better understand the Archer Group's model, evaluate the impact of its actions in a scientific way and help contribute to its diffusion at the national level (see Table 2).

5. Discussion and conclusion

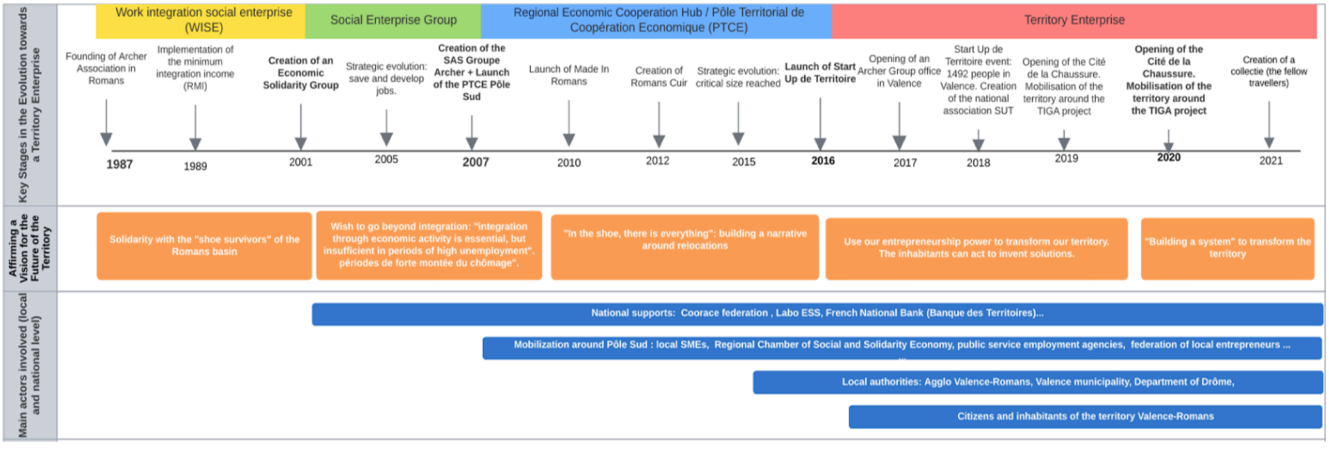
If some recent studies have begun to analyze the transformation to a dynamic sales-driven social enterprise (Refícco et al., 2021), our work highlights the crucial role of the territory in the strategy and objectives of social enterprises. Indeed, by analyzing the emergence of territory enterprise as a new organizational form, this article contributes to the reflection on place sensitive research for social enterprises. As we observe, the organization is closely linked to the economic history and evolving needs of the local population. Greater attention to local issues would allow many social enterprises to become more locally rooted, and to better collaborate with other public and private stakeholders (and particularly citizens) to develop their activities. This extends the works that consider that sustainable social practice is by definition linked to place (Seghezzo, 2009) and that place-based enterprises are more likely to engage in sustainable value creation, as they explicitly mobilize place-bound norms (e.g. solidarity, autonomy, traditions) for their entrepreneurial operations (Kibler et al., 2015). Overall, involved in the construction of new organizational forms, organizational actors strengthen their capacity to act on their environment. For David et al. (2013), new organizational forms that 'bring together resources in an original way, project new social identities and build new types of exchange networks (…) are important drivers of social change' (p. 356). Our study thus suggests that social enterprises must sometimes know how to evolve their organizational form to continue to provide relevant responses to local social or environmental issues.

More specifically, while there are many commonalities with the concept of social enterprise (Gupta et al., 2020) or local enterprise, we also highlight the conceptual specificities of territory enterprises. Instead of focusing on a particular social or environmental problem - or to target only distinctive categories of people or needs (Somerville & McElwee, 2011) – like most social enterprises (Battilana et al., 2015), they organize their strategy around territorial issues. In this vein, the history of the Archer Group shows a clear shift from repairing the socio-economic consequences of the region crisis towards a search for transforming the region's economy, and a broader desire to 'change the world' (Christophe Chevalier). Territory enterprises can then create an organizational form dedicated to tackling 'regional divisions' (Davezies, 2012). In addition, territory enterprises can operate in very different sectors and find their coherence of actions in their commitment to contribute to local development in a broader way. During this period, the group has gradually developed a strategy that goes 'beyond the boundaries of its organization.' (Christophe Chevalier). Indeed, the objective of territorial development typically requires a comprehensive approach and makes territory enterprises likely to become multifunctional organizations that address simultaneously economic, social, and environmental goals (Varady et al., 2015).

We also contribute to the literature on organizational forms. Most of the research on the creation of new organizational forms of social enterprises focuses either on the emergence phase (Tracey et al., 2011) or on the comparison between the new organizational form and the initial one (Ko & Liu, 2020). We give a more fine-grained analysis of the evolution of an organizational form over time and suggest a more complex and less linear picture of how territorial processes are incorporated within social enterprises. The processual approach highlights the'turning points' of transformation. Moreover, our specific focus on the transformation from a traditional WISE to a territory enterprise explicitly reveals how institutional entrepreneurs reinvent traditional social enterprises. Usually, the actions of the institutional entrepreneur to bring about a new form are most often analyzed as realities or facts (Jayanti & Raghunath, 2018). With the notable exception of the article by Perkmann and Spicer (2007), who retrospectively studied the creation of a Euroregion (with a 'broad' understanding of the institutional entrepreneur to include all Euroregion directors), no study examines in detail the co-evolution of the role of the institutional entrepreneur and the organizational form. In that respect, we show that the skills of the institutional entrepreneur are not originally given but are constructed and confirmed over time. Reflexivity, political ability and capacity to convince others to embrace change or at least not resist it (Hardy & Maguire, 2017) are institutional skills that can only be acquired with time and experience.

However, there are many obstacles related to new organizational forms. These 'nonconforming firms' (Zuckerman, 1999) are often less recognized by different audiences and always run the risk of categorical

Table 2
Evolution from a social enterprise to a territory enterprise.



confusion. Therefore, new organizational forms must be more effective and better adapted to the environment so that the benefits outweigh the relative weakness of their newness. This is a main challenge. By following an institutional entrepreneur over time, we underline that learning new roles requires considerable time, efforts and high costs in order to create stable networks and links with customers and develop trusted relationships. In particular, the institutional entrepreneur constructed an entrepreneurial narrative in stages around the construction of a new organizational form and deployed what Harmon et al. (2015) call 'strategic rhetoric'. This construction of meaning is an essential step for a practice to be institutionalized (Green et al., 2009) especially concerning social enterprises (Chen et al., 2022). By constructing an argument to explain what a practice means and why it makes sense, the institutional entrepreneur provides theorizations to build shared recognition and meaning. Furthermore, the institutional entrepreneur is often in a position of responsibility and must also manage his/her structure operationally. In a dialogue with Christophe Chevalier, to whom we sent our contribution to collect his views, he insisted on this point: 'We cannot shift the lines if we do not succeed as an entrepreneur; if we do not raise funds, solve cash flow difficulties or carry out our projects then everything collapses.' This requires regular and daily trade-offs about organizing one's time and organizing one's operational, strategic and institutional priorities.

Some limitations to our research may provide opportunities for future analysis. Firstly, our ethnographically inspired approach is by definition highly contextualized and based on an in-depth study of a single case (Ozcan et al., 2017). Studying the dynamics of the development of an organizational form in a different context would allow us to explore the findings in greater depth. Furthermore, by concentrating our analysis on the role of the institutional entrepreneur, our study may have overlooked the role of local public authorities in the transformation of the territory. While the Archer Group has played a key role in the construction of a more sustainable region, local government authorities have extensive means of action to participate in the ecological, social and economic transition of their region. In addition, the public authorities can help to legitimize a private initiative by providing material or symbolic support (Muñoz & Kibler, 2016). Therefore, the interaction between the roles of institutional entrepreneurs and public authorities could be the subject of further investigation. In the same vein, the place and role of citizens in this territorial enterprise could be explored in more depth. In addition to taking all stakeholders into account, the challenge of analyzing the links and tensions between place and territory needs to be explored in further detail. Lastly, if resilient local efforts to address societal challenges may have potentially far-reaching impact, one of the conditions for success is that social initiatives be successfully scaled up. To this end, a more in-depth study of the interaction of social enterprise action at different levels (using, for example, the recent concept of 'double weaving' of Chatterjee et al., 2023) would enable us to understand the consolidation and spread of such initiatives.

To conclude, our research explores what entrepreneurship can do for the territory and its citizens beyond the traditional approach centered on economic growth (Slitine & Chabaud, 2023). Korsgaard et al. (2020) stress the importance of geographical space in analysing the dynamics of firm creation and development. Kibler et al. (2015) highlight that place matters through emotional attachment to the spatial context of sustainable ventures. More specifically, businesses have an increasingly active role to play in contributing to sustainable local development (United Nations, 2015). Relatedly, some studies of entrepreneurship in a rural environment (Müller & Korsgaard, 2018) or in an urban context (Cohen & Munoz, 2016) argue that certain enterprises that invest in their local area can help to solve any economic and social difficulties. This novel approach broadens the traditional economic focus to include social and environmental sustainability by a collective territorial dynamic (Deschamps & Slitine, 2024) prioritizing equity and long-term thinking in access to and use of resources within and between current and future generations (Pike et al., 2016). In the quest for innovative approaches to achieve a more sustainable mode of production within local contexts, 'prefigurative organizations' (Schiller-Merkens, 2022), such as territorial enterprises, are crucial actors in spreading alternative practices, beliefs, and values beyond their own organizational confines.

CRediT authorship contribution statement

Romain Slitine: Conceptualization, Data curation, Writing – original draft, Formal analysis, Methodology. **Didier Chabaud:** Conceptualization, Data curation, Writing – original draft, Formal analysis, Methodology, Supervision. **Nadine Richez-Battesti:** Writing – review & editing, Validation, Supervision, Methodology, Formal analysis, Conceptualization.

Declaration of competing interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

Data availability

Data will be made available on request.

Acknowledgements

The authors express gratitude to Silvia Costa and to the reviewers and participants of the 19th ACIEK conference (2023) and the 35th RENT Conference (2021) for their helpful comments and advice, which have significantly improved the text. However, the authors take full responsibility for any errors or omissions.

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