

Same but Different: Meta-Organization and Collective Identity Dynamics

Eric Michael Laviolette^{1*}, Sébastien Arcand², L. Martin Cloutier³ and Laurent Renard³

¹Department of Strategy, Entrepreneurship and Innovation, TBS Education, Toulouse Cedex, France

²Department of Management, HEC Montréal, Montréal, Canada

³Department of Analytics, Operation, and Information Technologies, Écoles des Sciences de la Gestion, Université du Québec à Montréal, Canada

Abstract

This article analyzes how a meta-organization (M-O) can shape a coherent collective identity over time. Previous foundational work on identity formation in M-Os has provided fragmented but insightful ideas on several activities that this process entails. However, we currently lack a dynamic, integrative, and empirically supported model that demonstrates how these activities interrelate to shape a coherent collective identity over time. Using an in-depth case study of an association of cider producers in Québec (Canada) over a 23-year period, we develop a model of collective identity dynamics, in which an M-O plays an orchestrator role that is both dual and continuous. On the one hand, an M-O balances the internal identity claims of its organizational members through alignment and differentiation. On the other hand, an M-O builds an externally coherent identity by assembling and positioning legitimacy among institutional actors. Our paper provides new insights into activities performed by an M-O during identity creation by analyzing whether this process includes both organizational and institutional actors, thereby reinforcing the intermediary nature of an M-O. Furthermore, it contributes to the collective identity dynamics literature by elaborating the stabilizing role of a bounded organization in collective identity dynamics at the interorganizational level.

Keywords: *Collective identity; Meta-organization; Identity dynamics; Legitimacy; In-depth case study*

Handling Editor: Bertrand Valiorgue; Received: 2 December 2019; Accepted: 27 October 2021; Published: 1 June 2022

Meta-organizations (M-O) are formal entities whose members are organizations that share common goals and objectives (Ahrne & Brunsson, 2005, 2008; Ahrne et al., 2016; Berkowitz et al., 2017). Compared to individuals, organizations are more diverse, more powerful, and less predictable. Given their dependence on members, M-Os are frequently subject to conflicts. To facilitate coordination among its members, M-Os rely on soft laws or standards rather than hierarchy to achieve consensus. However, despite their structural weakness, M-Os are usually efficient in coordinating the collective action of members in the long run (Berkowitz & Dumez, 2016). An important line of investigation to understand this mode of conduct is to explore how an M-O shapes a collective identity over time to facilitate coordination among its members.

Previous foundational work on collective identity formation in M-Os has provided insightful ideas on its internal dynamics. Balancing similarities and dissimilarities is discussed as a central

activity to shape the collective identity of organizational members (Ahrne & Brunsson, 2005, 2008). M-Os not only may decide to recruit and include diverse members, thus increasing their dissimilarities, but also is essential to maintaining a coherent collective identity by strengthening their similarities. Thus, M-Os must strike an optimal distinctiveness for their members to satisfy their need to be both included and unique (Brewer, 1991; Snihur, 2016; Zhao et al., 2017). This need is particularly important to prevent an identity crisis, which may arise when some members decide to pursue different objectives (Karlberg & Jacobson, 2015).

Another line of research has addressed the external dynamics of identity formation with respect to institutional actors, such as public authorities. M-Os are particularly suited to coordinate the various interests of their members by acting as their legitimate voice to address public authorities (Rajwani et al., 2015). To achieve legitimacy (Suchman, 1995), M-Os often reinforce similarities among their members, thus inducing a categorization

*Corresponding author: Eric Michael Laviolette, Email: em.laviolette@tbs-education.fr

(Dumez, 2008) that encapsulates, to a certain extent, their collective identity attributes. However, this category might change when an M-O interacts with institutional actors with salient internal and external legitimacy issues (Laurent et al., 2019) to exercise greater control and better predictability over their environment. Thus, this stream of research underlines the importance of legitimation and M-Os' interactions with public authorities to better understand collective identity formation.

Although insightful, these studies address collective identity formation in M-Os in a fragmented way. There is a lack of a dynamic, integrative, and empirically supported model that demonstrates how both internal and external dynamics interrelate to shape a coherent collective identity over time. Collective identity is defined in this study and analyzed as a set of dynamic processes comprising continuous oscillations between integrations and responses to heterogeneous challenges when it involves multiple organizations (Beech & Huxham, 2003; Ellis & Ybema, 2010; Ungureanu et al., 2020; Ybema et al., 2012). This dynamic approach is relevant to capture these complex processes as a set of continuous cycles potentially leading to the consolidation or fragmentation of a collective identity over a longer period.

Building on an in-depth case study of an association of cider producers in Quebec over a 23-year period, we develop a model of collective identity dynamics where an M-O plays an orchestrator role in shaping identity that is dual and continuous. On the one hand, an M-O balances the internal identity claims of its organizational members through alignment and differentiation. On the other hand, it legitimizes an externally coherent identity by assembling and positioning legitimacy among institutional actors. By integrating fragmented contributions on identity formation in an M-O, our paper offers new insights into the intermediary role of M-Os in collective identity dynamics with continuous interactions among internal members and external actors. Furthermore, this paper contributes to the collective identity dynamics literature by highlighting the orchestrating role of a bounded organization such as an M-O in the collective identity dynamics between organizations.

Theoretical background and problematization

For the past decade, the literature on M-Os has expanded through several contributions that followed the seminal works of Ahrne and Brunsson (2005, 2008). An important line of work has focused on the inherent organizational nature of an M-O, investigating the different configurations of M-Os, why and how they are created and the consequences of their actions (Berkowitz & Bor, 2018; Berkowitz & Dumez, 2016; Valente & Oliver, 2018). Another research strand has focused on the relational nature of an M-O, exploring how M-Os

interact with various stakeholders, especially public authorities (Bonfils, 2011), to create and diffuse common principles (Berkowitz et al., 2017) and build their legitimacy (Laurent et al., 2019; Suchman, 1995).

Both the organizational and relational views tend to reassert the importance of framing M-Os as formal but incomplete organizations (Ahrne & Brunsson, 2011) that serve both internal and external activities (Laurent et al., 2019), regardless whether these activities are related to the coordination of organizational members or the management of relationships with various stakeholders. An M-O acts as an intermediary that coordinates and manages relationships via a mediating role between members and external stakeholders (Frandsen & Johansen, 2013). In all these relevant studies, the central issue of collective identity is a paramount element, yet it is fragmented and not discussed thoroughly.

Among the internal activities of an M-O, membership definition is central (Ahrne et al., 2016). Members enroll according to a set of attributes they share with other members. However, if similarity is important, each autonomous organization member must also be recognized for its unique features. Optimal distinctiveness represents individuals' need to find an equilibrium between assimilation and uniqueness (Brewer, 1991). Such a dual nature is also prevalent in organizations, especially new ventures as they shape their organizational identity (Snihur, 2016). As an M-O enrolls new organizational members, it must assimilate them while recognizing their differences. Such strategic balance also appears to be a central activity that M-Os perform to build legitimacy (Zhao et al., 2017).

Ahrne and Brunsson (2008) define this paradoxical function as the balancing of similarities and dissimilarities among members. As an M-O performs such a function, tensions and conflicts may arise and may result in an identity crisis (Karlberg & Jacobsson, 2015), which can threaten its existence and lead to a loss in credibility. In response, an M-O can redefine the membership standards that may, *de facto*, exclude members with dissonant identity claims. In their paper on the Swedish women's movement, Karlberg and Jacobsson (2015) show how an M-O redefined its boundaries to exclude political parties from its base to refocus its identity for better coherence. Thus, balancing can restore confidence among members regarding their common principles and goals in order to be perceived by external stakeholders as a cohesive and powerful organization.

Therefore, collective identity formation can also be evaluated through the external activities of an M-O as it interacts with stakeholders. A coherent collective identity is dependent on how the latter perceive the M-O. In this respect, identity formation is also closely related to categorization (Dumez, 2008). Categorization is the process by which individuals understand the world through the classification of objects and events (Rosch & Lloyd, 1978) to achieve maximum

information about them with the least cognitive effort. This creates a system of related categories or taxonomy that generates a cognitively structured order.

As an M-O is created, it regroups its organizational members in a category where they share a set of common attributes. The higher the similarity among members is, the more exclusive and distinctive they are likely to be. This can sharpen the collective identity of its members and their perception as a coherent category by stakeholders, as was the case in the brewery industry, where microbrewers have strengthened their distinctiveness from mass-market brewers (Carroll & Swaminathan, 2000). However, increasing similarities among members may reduce the ability of an M-O to recruit new members, thus reducing its representativeness.

One of the purposes of categorization is to build legitimacy. Legitimacy can be considered a strategic asset to achieve organizational goals and leverage resources (Bailey & Koney, 2000; Pfeffer & Salancik, 1978). It is a 'generalized perception or assumption that the actions of an entity are desirable, proper or appropriate with some socially constructed systems of norms, values, beliefs and definitions' (Suchman, 1995, p. 574). Legitimacy can be a means for an M-O to strive more successfully for resources by claiming a specific identity that is more aligned with expectations and pressures from different stakeholders (Whelan et al., 2019). However, it is also a way for M-O members to be more confident that they are doing the right thing in a self-selected quest for standards of action (Laurent et al., 2019; Pallas et al., 2015).

In the context of a civil society M-O, Laurent et al. (2019) demonstrate how legitimacy is double sided. On the one hand, internal legitimacy is leveraged for action. By engaging members in common projects, an M-O aims to secure and strengthen their support (Laurent et al., 2019). Here, the M-O acts as the meta-manager through its secretariat to convince influential members to share their power and surrender their autonomy (Ehlinger et al., 2007; Gadille et al., 2013). On the other hand, external legitimacy is like a roof to protect members from outside pressures (Meyer et al., 2013). Here, the M-O regulates external pressures from institutional actors to protect it from legitimacy critiques (Whelan et al., 2019). The relationship to categorization is more explicit here because the M-O engages its members in a process of categorization to demonstrate and defend the coherence of a collective identity.

To better capture collective identity formation by an M-O, we frame it as cycles of identity formation (Ungureanu et al., 2020) that originate at an interpersonal level, whereby organizational members assign other members to social categories, inducing higher-level interpretations of other members' actions through self-reinforcing mechanisms (Beech & Huxham, 2003; Ellis & Ybema, 2010; Ybema et al., 2012). Therefore, collective identity dynamics in this context are likely to be 'characterized

by a unique mix of highly heterogeneous challenges, on the one hand, and the constant need to consider integration imperatives on the other hand' (Ungureanu et al., 2020, p. 200).

This is where an M-O is likely to play a central role by engaging members in cycles of identity work and play that is supportive of interorganizational innovation (Webb, 2017). On the one hand, M-Os may invite members to match their interests in new activities, thus opening new possibilities for their collective identity. On the other hand, M-Os may provoke members by questioning the coherence of their identity, thus limiting their activities and refocusing the collective identity. Following this line of thought, we ask *how does a meta-organization shape the collective identity over time to facilitate coordination among its members?*

Research methods

We develop an in-depth single case study approach (Eisenhardt, 1989; Yin, 2017) by investigating an association of cider producers in Quebec, previously known as the 'Craft Cidermakers of Quebec' (CAQ in French), when established in 1992. In 2017, it changed its name to the 'Cider Producers of Quebec' (PCQ in French). Our investigation covers the 1992–2015 period, prior to the name change.

Data sources

Considering the nature of the available data, a qualitative approach with two different but complementary types of data were used to constitute the dataset.

In-depth interviews

From April to May 2015, a series of 18 in-depth semi-directed interviews were conducted with cider producers as PCQ members. All interviews were conducted *in situ* at the cidery. Seven of the respondents were elected board members sitting on the PCQ administrative board. Our access to board members enabled us to conduct more extensive interviews via specific questions on their active roles within the M-O. The sample was purposeful to ensure respondents included a variety of members in terms of cider production (volume sales) and geographical location (across four main cider production regions in Québec). Shared interview content saturation was reached after 18 interviews (Fusch & Ness, 2015).

We interviewed the owner-managers of cideries because of their central foundational and managerial role within their organization (usually small businesses) and their central representative role in the M-O. All interviews were conducted by two research team members using a semi-structured interview guide in three main parts:

- The first part was an account of the background of the interviewee in relation to the foundation and development of its cidery.
- The second part focused primarily on the strategy and organization of the interviewee's cidery and on how it is different, from an organizational identity perspective, from the other cideries.
- The third part focused on the M-O, its interaction and collaboration with the interviewees, and their representational roles held within it.

After each interview, the two researchers compiled their field notes, and a research assistant transcribed every recorded interview. In total, the transcripts of interviews comprise 360 pages of narratives. Table 1 provides more information regarding the cideries where the interviews took place.

Archival data

To complement the semi-directed interviews, access was secured to archival data concerning all of the formal meetings of the administrative board from 1992 to mid-2015, a list of members, and other documents related to various activities and decisions. These documents consist of minutes of formal meetings held during the 23 years covered by the research. Table 2 provides descriptions of the archival data in terms of document types and the coding scheme used to identify

individual documents and the number of documents collected. Considering the importance in the content and quantity of administrative board and general assembly minutes, three distinct categories were created (Board Meetings, General Assembly, and Others). In total, 306 documents totaling approximately 900 pages were retrieved. Table 2 provides an overview of the general document contents.

Data analysis

The research was a process analysis of identity dynamics within an organizational context based on interview contents and archival data corpus of the M-O (Langley, 1999; Pentland, 1999; Van de Ven, 2007). To analyze both interview and archival data, the Gioia approach (Gioia et al., 2013) was followed by combining deductive and inductive cycles to show how concepts are inferred from the data.

First, we started with open coding by identifying initial data concepts and grouping them into first-order concepts. This was executed by comparing data from different interview contents from interviewees. The open coding was also performed by extracting the most relevant parts of the 306 documents that relate to identity issues and collective actions. A first-order concept was created only when it reoccurred in the contents from at least two interviews and two archival documents. In total, eight first-order concepts were inferred.

Table 1. Producer and production site information

Cidery	Production size (bottles)	Location	Interview duration
CP1	>50,001	Hemmingford, Montérégie	48 min
CP2	<10,000	Saint-Pierre d'Orleans, Chaudières-Appalaches	54 min
CP3	<10,000	Saint-Antoine de Tilly, Chaudières-Appalaches	44 min
CP4	>50,001	Saint Nicolas, Chaudières-Appalaches	43 min
CP5	>50,001	Sainte Cécile de Milton, Estrie	65 min
CP6	>50,001	Frelighsburg, Estrie	49 min
CP7	<10,000	Franklin, Montérégie	59 min
CP8	>50,001	Hemmingford, Montérégie	80 min
CP9	10,001–25,000	Rougemont, Montérégie	49 min
CP10	<10,000	Rougemont, Montérégie	48 min
CP11	>50,001	Rougemont, Montérégie	59 min
CP12	<10,000	Mont St-Hilaire, Montérégie	50 min
CP13	25,001–50,000	Dunham, Estrie	60 min
CP14	<10,000	Saint-Joseph-du Lac, Laurentides	60 min
CP15	10,001–25,000	Saint-Joseph-du Lac, Laurentides	60 min
CP16	n.a.	Dunham, Estrie	65 min
CP17	<10,000	Frelighsburg, Estrie	65 min
CP18	>50,000	Saint-Paul-d'Abbotsford, Estrie	70 min

N.B: When using quotes, we maintained the anonymity of the interviewees. The CP (cider producer) code is used to ensure confidentiality. The numbers do not necessarily correspond to the chronological order in which the interviews were conducted.

Table 2. Examples of archival data corpus analyzed

Document type	Description	Code	Example	N
Meeting Agenda	Agenda sent to board members before meeting.	OT_DATE	OT_1996_04_14	114
Meeting Minutes	Report sent to board members after meeting, with details on deliberations and decisions.	BM_DATE	BM_2005_03_21	114
General Assembly	Annual report sent to all members on deliberations and decisions of the general assembly.	GA_DATE	GA_2012_03_13	22
Annual Report	Annual report sent to all members as a summary of main events, decisions and actions taken.	OT_YEAR	OT_2008	22
Letters	Correspondence with members and stakeholders, cited in board meetings.	OT_DATE	OT_2000_11_20	12

BM, Board Meeting; GA, General Assembly; OT, Others.

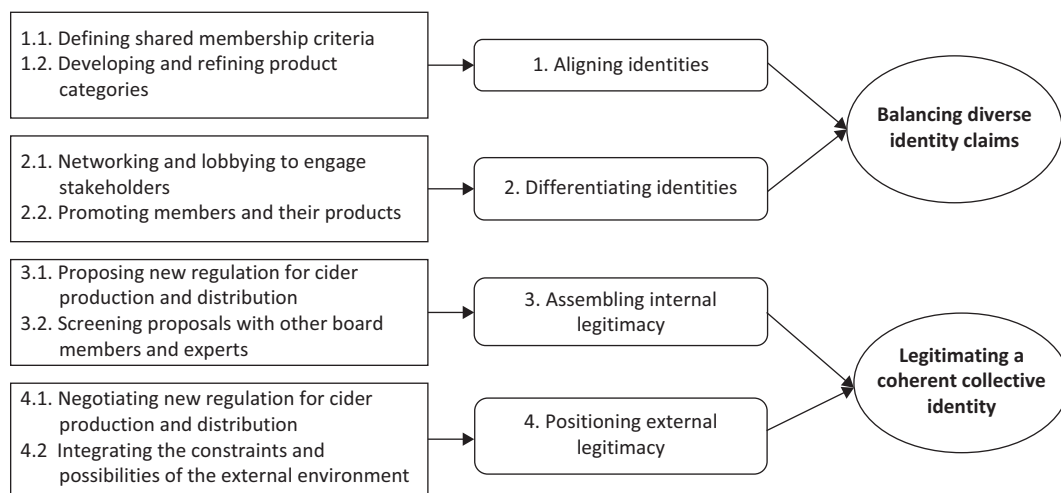


Figure 1. Data structure

Second, we moved to axial coding to analyze deeper relationships between first-order concepts and more abstract second-order concepts. We moved back and forth from the literature to our empirical data. According to Saldaña and Omasta (2016, p. 23), ‘analysis does not start after all the data have been collected. Analysis is an ongoing process from the beginning through the end of an inquiry’. As a result, coding can take place after the identification of recurrent themes throughout the multiple readings completed by researchers. In multiple iteration cycles between theory and data, we integrated concepts such as internal and external legitimation or identity alignment or differentiation. That iterative process led to the creation of four second-order concepts.

Third, we gathered the second-order concepts in two aggregates corresponding to the two main processes of collective identity dynamics that are balancing diverse identity claims and building a coherent collective identity. To highlight the role of the M-O in the formation and sustenance of the group’s identity and actions, selected text excerpts from archival documents were extracted in support of the statements

of cider producers interviewed. Figure 1 (adapted from Gioia et al., 2013) illustrates how the inference process was conducted.

Data analysis supports the development of a comprehensive and dynamic M-O model with internal and external dynamics of the collective identity of Quebec cider producers. Internally, the M-O is engaged in balancing processes to shape distinctive and sometimes opposing identity claims of its organizational members. Externally, the M-O is engaged in legitimation processes to build a coherent collective identity with main institutional actors. Table 3 details additional supporting data used to establish different categories. These data consist both of excerpts from archival documents and quotations from interviews.

Case study context

Since its foundation in 1992, the association of Cider Producers of Québec (PCQ) has played a fundamental role in the recognition and development of the cider industry in Québec.

Table 3. Additional supporting data for each first-order category

I. Aligning identities

I.1 Defining shared rules of membership

'X is accepted as a member of the association for 1 year despite his change in status from small-scale production permit holder to industrial cider maker permit holder. (Board meeting extract: BM_1994_03_16)

'If I just compare myself to a vineyard in Ontario, we are small cider producers. One of the problems we have is that 75% of the 60 members are very small cider producers (emphasis). Well, they have their vision for the industry; it's like, ok, we want to live in the countryside, we have an orchard'. (CP-5)

I.2 Developing and refining product categories

'The association of PCQ has a request for the RACJQ to modify the latest cider regulation to keep the following designations: 'cidre apéritif', 'pommeau du Québec', as mentioned in the previous regulation of September 20, 1996. Another request is to replace the designation 'classical and traditional method' by 'Champenoise method', which is common and already used on our product labels'. (Board meeting extract: BM_1997_11_04)

2. Differentiating identities

2.1. Networking and lobbying to engage different stakeholders

'Book Proposal on cider written by J-P Tremblay, Ed. Montcalm. The book will be distributed across Québec approximately 16,000 copies (...) General theme is on cider and recipes to show cider and food pairings'. (Board meeting extract: BM_1997_02_19)

'Desire that the MAPAQ and the Ministry of Tourism support us at the commercialization level. Training of the Craft Cidermakers of Quebec. The Union des producteurs agricoles asks us to write a leaflet like the one of wine growers'. (BM_1992, p. 1)

2.2. Communicating and promoting members

'X will call RACJQ to have a comprehensive list of all the regional fairs to set up a calendar of events where we can sell our ciders. The promotion will be more interesting'. (Board meeting extract: BM_1997_12-22)

'As of March 7, the Association has received 35 registrations for one or more of the conference activities. Several reminders to encourage members, partners and suppliers to register will take place between now and the event'. (BM_2014_07_03: 4)

3. Assembling Internal legitimacy

3.1. Proposing new regulation for cider production and distribution

'We have a project to set up a cooperative with ten other members. If we look closely at our products, there are slight differences. 10% maybe. We all use the same recipes, more or less the same apple varieties. The idea is to have the same brand for everyone and then we can be more flexible on production and bottling at different locations, as specified in the regulation. This means that even if it's the same brand, cidermakers will still have differences depending on the [regional] origin of the cider. We have been discussing this at our meetings. Some are for it and others are against it. Some fear that everyone in the same pot will be detrimental to them'. (CP-14)

3.2. Screening proposals with other board members and experts

'Certification of ice cider by an external independent body. To move forward in this direction, the ice cider committee proposes to organize ice cider tasting in a certification environment. Eligible Ice ciders. Even if the SAQ suggests that ice cider should have a % of alcohol per volume in between 7% and 13%, the committee proposes the following definition: Ice cider (...) must have a proportion of 310 grams of residual sugar per liter obtained by natural cold (...) a percentage of alcohol in between 9% and 13% per volume. Artificial freezing is banned at any transformation phase'. (BM_2004_12_01)

4. Positioning External legitimacy

4.1. Negotiating new regulation for cider production and distribution

'Cider is certainly a valuable product as everyone agrees and it can be regulated differently from other alcohol products'. (Meeting with a governmental committee on alcohol industry: OT_1994_12_11)

'They (RACJQ) have listened to our request to have the right to sell at public markets. We have obtained their backing, and this will be useful to convince the SAQ and the Ministry of Public Safety'. (BM_2003_10_21)

4.2. Integrating the constraints and opportunities of the external environment

'Most of our clients are people who truly like working with local products and small producers. We are also proud to say that they have our ciders there and that we are a small cidery. We are not the largest cidemaker that we find at the SAQ. Therefore, it brings them diversity'. (CP-3)

SAQ, Alcohol Society of Quebec; MAPAQ, Ministry of Agriculture, Fisheries and Food of Quebec; RACJQ, Regulatory Agency for Alcohol, Races and Games of Quebec.

It is an exemplary case study to investigate the role of an M-O in collective identity dynamics for several reasons. An overarching reason is that Québec is a landmark in forming and sustaining a francophone collective identity at the regional/national level over time. Identity at this level can influence organizational identity (Baba et al., 2021). The association of PCQ is, thus, embedded in this rich context, where identity work is common with several material and symbolic forms of the

collective francophone identity. To a certain extent, cider and ice cider products are part of these artifacts. Even if the products share some distant similarities with the French ciders from either Normandy or Brittany, the range of products developed are innovative Quebec products and sold as such. Beyond this primary argument, the association of PCQ is a compelling case as an M-O because there are several tensions among members at three levels: individual, organizational, and institutional.

At the individual level, there are tensions among members from different professions. We name insiders those originating from agricultural industries and rural environments, while outsiders are those coming from urban settings and service industries such as media or IT. Tensions between insiders and outsiders are explicit regarding the processes of cider production and sales. The former tends to plead for more conventional practices that are inherent to agricultural industries, while the latter are more open to less conventional practices coming from other industries. Both insiders and outsiders are more likely to rely on practices going back to their professional or living backgrounds.

At the organizational level, there are tensions in strategic visions and actions. On the one hand, some cidemakers want to sustain their business while maintaining their autonomy rather than growing. On the other hand, some want to develop their business even if it means losing their long-term autonomy. This creates marked differences in terms of business conduct and strategy. In one case, it is rather a logic of specialization and local development with a craft orientation. In the other case, it is a logic of diversification and international development with a growth orientation.

At the institutional level, there are tensions concerning the image and the quality range of cider products. On the one hand, institutional actors (RACJQ, SAQ, etc.) require a constant level of quality and supply leaning toward cider products conformity and uniformity. On the other hand, cider producers want to promote novel cider products tending toward cider products diversity. Thus, continuous tensions lead to the expansion and contraction of cider products with different designations. Taken altogether, these reasons plead strongly for the PCQ as an illustrative case to understand collective identity dynamics and the specific role of an M-O in shaping it.

Findings

Two main findings emerge from data analysis. First, the association of PCQ balances diverse identity claims in two complementary ways. On the one hand, it enrolls its members in activity definitions and categorizations that align their identities. On the other hand, it also proposes networking and communication activities that enable them to differentiate their identities. Second, the PCQ builds a coherent collective identity in two interdependent ways. On the one hand, it involves some powerful members sharing their legitimacy and expertise in the design of new production and bottling requirements, labelling, and distribution regulation. On the other hand, it engages the same members to negotiate with different institutional actors, such as the SAQ, the MAPAQ (Ministry of Agriculture, Fisheries and Food of Quebec), and the RACJQ (Regulatory Agency for Alcohol, Races and Games of Quebec).

Balancing diverse identity claims

Given its diverse membership composition, the PCQ is subject to multiple identity claims that one or several members may express in different situations when they interact (at meetings, events, etc.). Such claims may concern a specific cider product designation or its production process or even practices to sell products. These identity claims may be shared by several members, giving more weight to some claims than others. Thus, a central activity of the association of PCQ is to balance members' diverse identity claims by not only aligning them to build similarities but also by differentiating them to acknowledge dissimilarities.

Aligning identity claims

To align identities, the PCQ performs two activities: (1) defining shared criteria of membership and (2) developing and refining product designations.

Membership was defined by three criteria: being an apple producer; having a small-scale cider production permit and paying the annual membership fee. This was set as strict criteria for including new members.

Initial definition of membership of 1 April 1992 chapter 111. Any physical person meeting the following conditions: be an agricultural producer as defined by MAPAQ, be a holder of a small-scale cider production permit from RACJQ, pay an annual fee fixed by the board and be accepted by the board. (Board meeting quote extract: BM_1992_1993)

A key dimension is to be an apple producer with control over all activities from apple cultivation to cider distribution as underlined below by an important member of the association who was not initially accepted as he was the holder of an industrial cider maker permit.

I'm a producer first of all. I grow my apples. It's my raw materials that I transform. For me the small-scale craft, industrial cider maker or distiller permits, it's the same thing. First, I produce what my orchards give me. If I were an industrial cider maker permit holder only, I would buy my apple. That's the regulation. As long as you grow your own apples, you have control over the process from start to finish. (CP-11)

As this important member (in terms of its production output) joined the administrative board, the PCQ started altering the criteria of membership to accommodate both small-scale craft and/or industrial cider maker permit holders. The *Act Respecting the Société des Alcools du Québec* (chapter S-13), specifies these two types of permit holders (LégisQuébec, 2021a). Slowly, the distinction between a small-scale craft and an industrial cider maker identity became less important as the association of PCQ incorporated new members who are holders of both types of permits within it with a set of new criteria

(1/3 of members holds concomitant production permits, that is, both small-scale craft and industrial cider maker permits).

New delimitation of membership: A. Be a cider producer; B. Own an orchard of at least 1 hectare; C. Transform cider on site; Hold a small-scale craft and/or industrial cider maker permit. (Board meeting extract: BM_1995_01_16)

Even if the rules of membership are still anchored around these three criteria, they are always subject to discussion and debate as stated in a correspondence of the board with another important member (in terms of production output), who had recently joined the PCQ.

Mail sent to the Board on 2 March 2004. Hi, as discussed on the phone, I was very surprised to hear the events that took place in the last [association] general assembly. I have two questions for the next meeting. 1. What is meant by the new rules that were voted stipulating that members of the board must be orchard owners. This is vague; what is needed of a corporation, for example? Can you define 'owner' for me? 2. How is it possible that this new regulation was not on the agenda (...) and was not submitted 15 days prior to the GA meeting as it is stipulated in the general [association] rules? (OT_2004_03_02)

Letter sent to X. Mr. X, following our meeting on (...) the members ask you to refer to Article 91: 'Only the board has the power to adopt and modify the association's rule. Moreover, they become effective after their adoption by the board and stay applicable until the next general assembly, unless they are ratified by an exceptional vote. If these modifications are not ratified by a simple majority (50%+1), they are no longer applicable' (...) Reference to the general association's rule for member admission: 'A. Be a cider producer; B. Grow an orchard of at least 1 hectare'. (OT_2004_03_11)

If membership definition is an important activity to align identity, another central activity is product designation, as stated by an ex-president of the administrative board:

We have a [government] regulation now in effect even if there have been some errors. The problem is that we have to accommodate everyone. Everyone has a say and wants to have a designation for his or her own products. We lack homogeneity in that respect. Same thing for marketing. There are so many products. In France, even if there is a specific cheese for each region, they do not have 36 (ed. sic) cheeses. Therefore, what we have in common is that we are cider producers, and we have quality products. (CP-8)

One way to align different members along similar lines is to engage them in common projects that normalize, that is, define and designate products as stated below:

Presentation of a quality enhancement program for small enterprises in food production: it's a pilot project. X will be the contact person to evaluate the needs. Quality control is based on tests, routines, control, cleaning, etc. It's also a way to collect data on several criteria (acidity, temperature). (Board meeting extract: BM_1997_08_07)

Such a quality enhancement program is likely to clarify the production processes of specific cider designations, such as ice ciders, as a producer explains below:

For me, it's frozen apples outside [*for making ice cider*]. Otherwise, I don't do it [*ice cider*]. I still hope that there will be one year without any apple freezing [*outside*] (...) I will not throw my apples away. I'm going to use the freezer to make a sweet cider. I will call it sweet cider and sell it for half as much. We'll have to do that to follow the regulation. (CP-1)

Identity claims revolve around the definition of different product designations, such as 'ice cider', which has different associated meanings. The quote above illustrates the type of tension that can arise among producers. To some extent, the association may resolve these issues by recalling that they follow the government *Regulation respecting cider and other apple-based alcoholic beverages* (S-13, r4) (LégisQuébec, 2021b), as another producer explains.

(We) are subject to the Quebec cider regulation which is unique in a way because it does not allow the addition of water to ciders. So many ciders that we see, like the X (anonymized), are using concentrates, with the addition of water, and we cannot have that. Here, we have to protect the purity of our little cider. Therefore, we are governed by these rules. This is how it is. (CP-2)

However, the association of PCQ can also defend some product designations when members reclaim their continuance:

The association of PCQ asks the RACQ that the last draft version of the regulation be modified to keep the names 'cidre apéritif' and 'pommeau du Québec' as mentioned in the version of the regulation on cider dated September 20th, 1996. (BM_1997_11_04; 1)

Through the definition of shared criteria for membership as well as the development and refinement of product designations, the association of PCQ tends to align identity claims to enable its members to define who they are as cider producers and what they produce in terms of products.

Differentiating identity claims

Although aligning identities is an important activity, the PCQ must also recognize the different identities of its members on multiple grounds. It does so through (1) networking and communication to engage stakeholders and (2) promoting its members and their products.

Members are encouraged to participate at different events that are not strictly business in nature but also social, as underlined below.

We do participate at events especially during week-ends. Over the years, we know those are truly effective. Therefore, we know

that we truly connect to potential consumers, etc. For competitions, we feel that winning a medal, whatever it might be, is not so important in the end for consumers. It doesn't increase sales, but it enables us to be visible, especially for our stakeholders, critics, etc. It signals that we are doing well. It can also be one way to recruit members and get new cidemakers. (CP-15)

These events were meant to strengthen the recognition of cider as a quality product category next to well-known wines and beers at different gatherings, including a specific club for cider tasting, the creation of a cider route, or specific events such as the pancake day (Cloutier et al., 2017).

Cider tasting knights. 19 April 1997: Enthronement of X and X as knights. Two ciders will be served as well as side dishes. Some journalists and critics are invited. The supper expenses will be supported by all the cider producers participating in the event. (Board meeting extract: BM_1997_02_19)

Follow-up meeting with ATRM (Association du Tourisme de Montérégie) – Cider routes Montérégie. X summarizes the meeting at the office of ATRM on the cider route of Montérégie and the Cider and Pancakes Day. The offer of ATRM is approximately \$110 per cider producer. (BM_2002_09_09)

Beyond networking and communication, the association is also well engaged in promotional actions of its members at different levels.

The association is sponsoring our participation at the International Cider Challenge. This is a project I want to get involved in. It's a great opportunity to show our product portfolio. It's a good way to attract potential customers at an event where they can taste and learn about our products. We should promote more such participation. (CP-9)

The International Eastern Wine Competition and Intertwine are the most important wine competitions. X will look at the next wine competition in Chicago and check if ciders are accepted. (Board meeting extract: BM_1997_12-22)

Whether it is through networking or lobbying actions or more common promotional or communicational actions, the PCQ further recognizes the diversity of its members by offering them different alternatives to differentiate their identity according to how they envision the quality of their product portfolio and their market scope (local, national, and international).

However, members often act as a group with their specific product and brand portfolios while referring to their membership to the PCQ. By doing so, the PCQ also underlines both the sameness and the distinctiveness of its members, especially in comparison to other alcoholic beverage producers (e.g., wine, spirit and beer producers).

Legitimizing a coherent collective identity

If balancing identity claims is central to forming a collective identity, another important activity is to legitimize this collective identity, especially to be credible in their relationship with institutional actors such as governmental bodies. To strengthen such credibility, the association has engaged influential members in the negotiation process with these bodies to propose new regulation.

Assembling internal legitimacy

The process of assembling legitimacy involves two activities that mainly take place within the association: (1) proposing new regulation for cider production and bottling requirements, labelling, and distribution (2) screening proposals by board members and external experts.

As new product designations appear, like the 'fire cider', several members have engaged in regulation revision to convince other members that this new designation is legitimate.

We have changed the regulation to make 'fire cider' (a new cider product) to become not only a brand name but also a cider product designation in the cider regulation. Since 2013, we can use it on our labels as is the case for ice cider. (Interviewer: how did you do it?). With the association and different ministries. We have worked with all producers interested in such a project. In the cider regulation, it is not written that we can use heat in the cider transformation process. If it's not written, it means that it's forbidden. The cidery we took over was making this product, but it was illegal to sell it. When we became owners, we realized that we could not sell this product. We decided to work to change the regulation, and I started to engage more strongly in the association. We also worked with an oenologist from OenoQuébec to achieve this. (CP-13)

Legitimacy is assembled not only with different member contributions but also through interactions with stakeholders, such as experts along the way, to get support and become more confident in their ability to persuade the RACJQ to accept a new product designation.

Regulation. X explains the evolution of the regulation change project since the last meeting. 'Pommeau' (designation) – Not accepted as a designation. Even if there is no formal ban to use it, the SAQ has informed us that any product labelled 'Pommeau' will not be accepted on its shelves. 'Champenoise Method'. This category will be registered within the limits in terms of commercialization (...) Round table on the regulation with several amendments listed (1, 2, etc.). Article. 61 is replaced by the following: Cider is transformed and bottled in Québec by a producer that must contain at least 80%, in final volume, of juice extracted from apples harvested in Québec'. The origin of the product made and bottled in Québec is signaled by this phrase: Québec Product. (GA_22_02_2001)

Even if there is an external validation by institutional actors, internal support is key to giving more momentum to some

projects rather than others, such as for the specific *Québec Ice cider* Protected Geographical Indication (PGI), based on the possibilities of the *Act respecting reserved designations and added-value claims* (LégisQuébec, 2021c).

The priority for me is to have a *Québec Ice cider* PGI. There are three steps to follow. The first one has been to work with a representative from an accredited certification body [that follows the specification manual] who said: you have to do this or that. Then, he came back and said, you have to go to the next step with the agreement committee for a chemical (or organoleptic) analysis to evaluate the color, the smell and the taste. I think achieving this second step will enable us to have this *Québec Ice cider* PGI as a reserved designation term shown on our cider bottles. It's important for consumers that such products have been audited and there is a know-how, a high-level of quality, that it has been audited by several experts. (CP-10)

The selection and retention of cider designations, whether as part of the general cider regulation or of the reserved designation and added-value terms act, such as the *Québec Ice cider* PGI, are performed by engaging influential board members and eventually external experts in the deliberation process.

Special Guest. X consultant and agricultural expert. Establishment of specifications for a reserved designation term *Québec Ice cider* PGI. Different steps must be followed: Phase 1: Pre feasibility study with advantages and disadvantages; 2. Meeting to set up the specifications (...) Cost estimation: Pre-evaluation: \$5,000; Final deliverables: \$50k – \$60k). (BM_2004_03_09)

Through the proposal of new product designations and their screening, the PCQ, thus, assembles internal legitimacy by proposing new initiatives and screening them by engaging its organizational members in interaction with selected external experts. Such a process can increase tensions and conflicts when members feel that the association is not defending their interests.

Positioning external legitimacy

Once internal legitimacy is assembled, the PCQ must position it externally, which involves two activities: (1) negotiating new regulation for cider production and bottling requirements, labelling, and distribution and (2) integrating the constraints and possibilities of the environment.

Once the regulation proposals are discussed and validated among members, a set of representatives are engaged to negotiate these proposals with institutional actors:

We have been consulted, but it's always the same thing. Ice cider, for example. We have taken so much time to reach an agreement among all producers. It's taking a long time to reach a consensus. Then, we formalize everything in files that we send to governmental instances, and they come back to us with different things. There are sometimes marked differences between what we proposed and what they validated. That's normal, but sometimes we don't truly understand what's the logic behind it. (CP-5)

For each of these negotiations, there are clearly influential members that play a leadership role:

Regulation X and Y sent a letter to A, Minister; B deputy, C, RAC-JQ and other persons. X is putting much energy on this file, and he expects answers from these different actors. He has also written another letter to Y at the SAQ concerning the regulation for ciders from outside Québec. (Extract from Board Meeting Extract: BM_1999_04_01)

Ultimately, the institutional actor has the final word. This can increase tensions and conflicts among cider producers if some of them feel that their proposals are not taken into consideration:

What a story (...) The SAQ has wrapped its offers with government remittances (...) They promised much and so the debate for selling at grocery stores and public markets ended... The other cider producers dismissed me because I persisted in asking for more than just a state monopoly. (CP-7)

(They) had a board with a quorum one evening, and then they called me at 11 p.m. to tell me that I was kicked out. Good! Three weeks later, all the other members were on the shelves of the 50 branches of the SAQ. (CP-7)

Despite these tensions, most organizational M-O members believe that they need collective action to be effective at this level, as expressed by one of the largest producers.

I think it's important to be in touch with the actors in the industry, to see the stakes, to share the challenges (...) to put our forces together for promotion. The category is important for representation before the SAQ or the government (...) It's better to speak (...) as a united voice than to push for different agendas. (CP-8)

The PCQ negotiation abilities are more effective than those of its individual members given its capacity to integrate swiftly the possibilities and constraints of the environment:

We have only two products on the shelves at the SAQ: two ice ciders, but we would like to also have our sparkling cider and the classical still cider. In fact, our sales are very low at the SAQ. We don't sell much there but when our clients buy our products at public markets or at specialty shops, they ask if our products are also sold at the SAQ. This gives credibility to our products (...) The SAQ has control on all the distribution channels. They also determine what will be sold at specialty shops (...). We need to have a stronger position. Get more support from the government and other actors (...) How come the Quebec wine association has been able to have more commercial space at the SAQ with a big promotion campaign even if they are selling less than us overall? (CP-7)

The PCQ is vigilant regarding any change that cider producers may anticipate and act upon as it is also expressed on tax reforms of the federal government below.

The federal government wants to harmonize all products like ciders, wines and beers. This will be more beneficial to large producers than smaller ones. There will be no \$50,000 ceiling tax. A tax will be applied to any liter of alcohol sold without limit (...) All this is extremely detrimental to small-scale craft producers. The PCQ is in opposition to this project. A draft was proposed by X but rejected as such. This will serve as a basis for another draft. Y is asked to take the responsibility to write the second draft. (BM_1999_06_09)

The strength of the PCQ is to be able to make sense of all this information, sometimes very technical, with its members in such a way that they are able to envision collective action:

Regulation of cider and designation of 'ice cider' and 'pommeau'. X explains that the RAJQC will have a meeting on this topic today. He will obtain a summary of this meeting, and he will present the main discussions during this meeting. X reminds everyone that there needs to be a special meeting for this important topic. There is a need to have a regulation for all craft products. The idea is not to restrict producers but to contribute to quality enhancement and a specific identity for each product designation. (BM_2004_12_01)

Overall, legitimacy positioning was critical for cider producers to build their collective identity through the recognition of their regulation for production and bottling requirements, labelling, distribution, etc. Over the 23-year period, one major achievement has been a gradual and significant shift in the cider regulatory framework.

A dynamic model of M-O and collective identity building

Our results demonstrate how the PCQ has shaped its collective identity over a 23-year period. Such dynamics can be

integrative and stable, thus contributing to establish a coherent collective identity for the M-O of cider producers. However, these dynamics can also be disintegrative and destabilizing as tensions and conflicts emerge. This can fragment the collective identity of cider producers. As Figure 2 shows, the PCQ plays a critical mediatory role in the resolution of these identity tensions through a dual and continuous process of balancing diverse organizational identity claims and legitimating a coherent collective identity.

On the left-hand side of Figure 2, balancing diverse identity claims is a set of activities that the PCQ engages with its organizational members to align their diverse identity claims through membership definition and product designation activities. However, organizational members have identity claims for both sameness and uniqueness. Thus, the PCQ also interacts with them by differentiating their identities through networking, communication, and promotion activities. Therefore, the PCQ continuously balances these claims as a set of inward processes (internally oriented) of alignment and differentiation that may either become more integrated or fragmented depending on the claims' heterogeneity.

On the right-hand side of Figure 2, legitimating a coherent collective identity is a set of activities that the PCQ also engages in with its organizational members through regulation proposal and screening to assemble their legitimacy in interaction with institutional actors. Legitimacy assembling is performed by influential internal actors with a leadership role and higher credibility with key external stakeholders. Consequently, they strengthen the legitimacy of their collective identity as they speak for the group with institutional actors. Following the interaction with them, the PCQ negotiates the regulation according to the possibilities and constraints of the institutional environment. Legitimacy is external, as it is positioned within a set of stable and existing norms and rules that preexist. Thus, collective identity is further legitimated through these outward

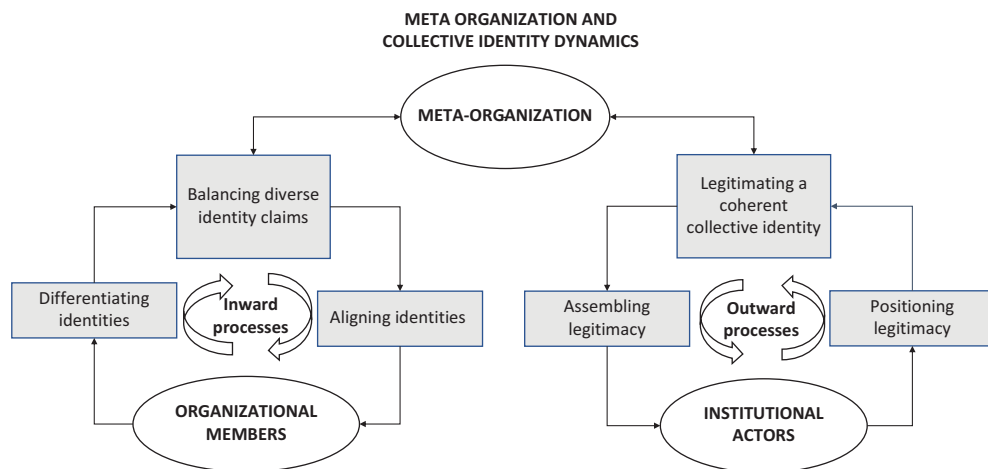


Figure 2. A dynamic model of M-O and collective identity building

(externally oriented) cycles of legitimacy assembly and positioning.

Consequently, the PCQ acts as an orchestrator, conducting these two complementary processes of balancing and legitimating identity at a collective level. The two processes involve both organizational members and institutional actors but to different extents on each side. Balancing is more internally oriented, whereas legitimating is more externally oriented. However, as underlined by the double arrows, these two processes are interlined by the double arrows, these two processes are interconnected with movements from one side to the other. External constraints or opportunities coming from institutional actors may support the PCQ in its balancing process, either to further align or differentiate their identities. Internal strengths and weaknesses may enable or hinder the PCQ in its legitimating process, either in assembling or positioning its legitimacy.

Discussion

Our findings carry two important implications. First, we relate the organizational and relational perspectives on M-O and collective identity formation by proposing a dynamic model where we conceptualize the intermediary role of M-O in such complex processes. Second, we explain how the M-O acts as an orchestrator to shape collective identity through cycles of identity work and play that may lead to the consolidation or fragmentation of collective identity over time.

An intermediary role connecting internal and external dynamics

Previous work has focused on the internal dynamics of identity formation by M-Os through the activity of balancing similarities and dissimilarities (Ahrne & Brunsson, 2008). Similar to an individual having both a first name and family name, a member organization can have a surname without losing its first name (Ahrne & Brunsson, 2008). By playing on these dual identities, organizational members can claim their differences while signaling their belongingness to a collective. Our findings confirm prior theorizing on the importance of balancing to support collective identity formation. However, collective identity is continuously subject to changes, especially when new members join the collective, possibly leading to a revision of membership standards (Berkowitz & Dumez, 2016; Brankovic, 2018).

Our findings highlight that an M-O is continuously engaged in the balancing of identity claims through both alignment and differentiation. This is due to organizational members' quest for optimal distinctiveness (Brewer, 1991) to balance uniqueness and assimilation when they form their organizational identity (Snihur, 2016). Rather than having a static view on identity as stable assertions, we consider them

as claims that encompass a set of discourses that emerge from the interactions among different actors (Albert & Whetten, 1985). Even if they bear the M-O name that may confer a dual identity, organization members continuously claim their unique identities when they collaborate and compete with other organization members for autonomy and power within the M-O. Thus, their identity claims are subject to changes and inflexions as they interact with other members on the basis of their common attributes and differences. Therefore, the M-O has a permanent responsibility of balancing their claims through alignment along a set of common membership standards and differentiation through categorization (Dumez, 2008).

Furthermore, as member organizations interact, they shape a collective identity whose legitimacy is central to operate in complex institutional environments. In those environments, given the importance and influence of institutional actors, 'categorization and identity are also externally assigned and members are then expected to subscribe to it in order to secure and maintain legitimacy' (Brankovic, 2018, p. 4). However, legitimacy is not in a state of equilibrium; it 'must be repeatedly created, recreated and conquered' (Hallstrom & Bostrom, 2010, p. 160). As an M-O shapes a collective identity, the main purpose is to legitimate such an identity internally for both its members and externally for institutional actors (Laurent et al., 2019).

Thus, legitimating a collective identity can be envisioned as a cycle of assembling legitimacy that starts with the engagement of influential members, viewed as leaders of the group, who already have a high level of credibility for both internal and external stakeholders (Wry et al., 2011). To a certain extent, these leaders share their legitimacy, thereby reinforcing the internal legitimacy of the M-O collective identity. Then, the same recognized leaders advocate the legitimacy of the M-O collective identity in interaction with institutional actors to give sense to what the group stands for and make sense of the expectations of institutional actors. In that cycle, legitimacy is positioned depending on how institutional actors may perceive the M-O as being resonant or dissonant within existing categories corresponding to the set of established norms and rules. This can result in pressures to conform to existing categories or the acceptance of emergent categories. Our foremost contribution is to explain in detail how an M-O plays a central intermediary and orchestrating role between its members and institutional actors to continuously shape identity in a movement that goes inward or outward.

An orchestrating role with identity play and work

Our findings illuminate the key role that an M-O plays as an orchestrator in shaping identity. On the one hand, the balancing process resonates with the cycle of identity play,

Webb (2017) identified such a process in an M-O when members are invited to develop new activities and new identity categories, enabling each member to act in different ways. In that sense, the M-O keeps the collective identity alive by creating possibilities for each member to circulate and play with multiple identities. Our findings demonstrate that this is inherent to collective identity formation and sustenance over time (Whetten & Mackey, 2002).

On the other hand, the utmost importance of sustaining a legitimate collective identity has been underlined, especially in times of identity crisis that may lead to a loss of credibility for external audiences (Karlberg & Jacobson, 2015), but this is usually conceptualized as a work of redefining the boundaries of collective identity. Our findings underline the continuous work that an M-O must perform to sustain a legitimate collective identity, especially when they are criticized (Whelan et al., 2019). This process of legitimacy resonates with the cycle of identity work, in which M-O members are challenged in their collective identity to limit their activities rather than open new ones (Webb, 2017). Identity work engages them in restraining the possibilities to align and fit with existing categories. Thus, the process consists in creating more coherence on shared meanings for a coherent collective identity rather than a consensual one forced via deliberation and agreement (Patvardhan et al., 2015).

Finally, collective identity dynamics are characterized by a continuous need to respond to both heterogeneous challenges that open possibilities and integration imperatives (Beech & Huxham, 2003; Ellis & Ybema, 2010; Ybema et al., 2012). Ungureanu et al. (2020) showed that collective identity can be swift and stable through a set of collaborative cycles that align, misalign, and realign identities. Our study partly supports this idea of constructive oscillation. We show that it can be stable due to the existence of an M-O as a bounded organization (Cropper & Bor, 2018) acting as an orchestrator to build a coherent collective identity (Patvardhan et al., 2015). This reinforces the idea that the 'actorhood' of an M-O is crucial (Berkowitz et al., 2020).

We also show that this constructive oscillation is never totally stable. Rather than trying to force convergences toward a consensual identity, an M-O 'creates coherence around shared problems, domains, mutual interest and practices' (Patvardhan et al., 2015, p. 428). Permanent identity tensions exist that an M-O must manage through continuous processes of balancing identity claims and legitimating the collective identity. Thus, our second contribution is to explain in detail how an M-O plays an orchestrator role in shaping identity through cycles of play and work that either open or close collective identity. This may lead to the consolidation of collective identity as it aggregates and becomes clearer for internal/external audiences, or it may lead to its fragmentation as collective identity disaggregates and becomes blurred.

Our findings open new research avenues on this central intermediary and orchestrating role of the M-O in collective identity dynamics when it involves multiple organizations within the M-O and in its institutional environment. Future research should pay more attention to institutional actors by analyzing how their relations with an M-O can forge these actors' process of identity formation. For instance, it might be insightful to investigate how they manage the boundaries (Dumez & Jeunemaître, 2010) of their identities to maintain their coherence. What are the frictions and connections that occur 'externally' at the boundaries of collective identity dynamics between them? Moreover, the collective identity dynamics of an M-O can be explored by focusing on the inflow and outflow of actors at the boundaries, such as potential incoming members joining the M-O or those leaving or being excluded from it. As we have discussed, collective identity dynamics are dual and continuous phenomena with both inward and outward movements at multiple levels (Baba et al., 2021). A specific focus on these fluctuations can be particularly insightful, especially to challenge the formal and bounded nature that we generally assign to M-O.

Conclusion

In one of their seminal works on M-Os, Ahrne and Brunsson (2008) underlined that identity and status are central purposes for their formation. On this central issue of collective identity formation within M-Os, there have been insightful contributions relating to either the internal dynamics or the external dynamics (Cropper & Bor, 2018; Dumez, 2008; Laurent et al., 2019). However, no contribution thus far has attempted to build on these foundational works to offer a comprehensive model that analyzes this complex process at the very heart of what an M-O does. We build on an in-depth case study of an association of cider producers to develop a dynamic, integrative, and empirically supported model to conceptualize the central intermediary and orchestrating role of an M-O that is dual and continuous over time. We believe that our research constitutes an important contribution to redirect research on M-Os in this essential area of investigation that is collective identity dynamics.

Acknowledgments

We thank the administrative board of the PCQ and all the members we have interviewed. Without this close connection to the field and free access to data, this research would not have been possible. We also thank Héloïse Berkowitz, the co-chief editor of *M@n@gement*, Bertrand Valiorgue, one of the associate editors for the special issue, and the anonymous reviewers for their helpful advice and guidance throughout the review process.

References

- Ahrne, G. & Brunsson, N. (2005). Organizations and meta organization. *Scandinavian Journal of Management*, 21(4), 429–444. doi: 10.1016/j.scaman.2005.09.005
- Ahrne, G. & Brunsson, N. (2008). *Meta-organizations*. Edward Elgar Publishing.
- Ahrne, G. & Brunsson, N. (2011). Organization outside organizations: The significance of partial organization. *Organization*, 18(11), 83–104. doi: 10.1177/1350508410376256
- Ahrne, G., Brunsson, N. & Seidl, D. (2016). Resurrecting organization by going beyond organization. *European Management Journal*, 34(2), 93–101. doi: 10.1016/j.emj.2016.02.003
- Albert, S. & Whetten, D.A. (1985). Organizational identity. In L.L. Cummings & M.M. Staw (Eds.), *Research in organizational behavior* (pp. 263–295). JAI Press.
- Baba, S., Hemissi, O. & Hafi, T. (2021). National identity and organizational identity in Algeria: Interactions and influences. *M@n@gement*, 24(2), 66–85. doi: 10.37725/mgmt.v24.7809
- Bailey, D. & Koney, K. (2000). *Strategic alliances among health and human services organizations: From affiliations to consolidations*. Sage Publications. doi: 10.4135/9781483328546
- Beech, N. & Huxham, C. (2003). Cycles of identity formation in interorganizational collaborations. *International Studies of Management & Organization*, 33(3), 28–52. doi: 10.1080/00208825.2003.11043686
- Berkowitz, H. & Bor, S. (2018). Why meta-organizations matter: A response to Lawton et al. and Spillman. *Journal of Management Inquiry*, 27(2), 204–211. doi: 10.1177/1056492617712895
- Berkowitz, H., Bucheli, M. & Dumez, H. (2017). Collectively designing CSR through meta-organizations: A case study of the oil and gas industry. *Journal of Business Ethics*, 143(4), 753–769. doi: 10.1007/s10551-016-3073-2
- Berkowitz, H., Crowder, L. B. & Brooks, C. M. (2020). Organizational perspectives on sustainable ocean governance: A multi-stakeholder, meta-organization model of collective action. *Marine Policy*, 118, 104026–104026. doi: 10.1016/j.marpol.2020.104026
- Berkowitz, H. & Dumez, H. (2016). The concept of meta-organization: Issues for management studies. *European Management Review*, 13(2), 149–156. doi: 10.1111/emre.12076
- Bonfils, I. S. (2011). Disability meta-organizations and policy-making under new forms of governance. *Scandinavian Journal of Disability Research*, 13(1), 37–51. doi: 10.1080/15017419.2010.481565
- Brankovic, J. (2018). How do meta-organizations affect extra-organizational boundaries? The case of university associations. In L. Ringel, P. Hiller & C. Zietsma (Eds.), *Toward permeable boundaries of organizations?* (pp. 259–281). Research in the sociology of organizations. Emerald Publishing Limited. doi: 10.1108/S0733-558X20180000057010
- Brewer, M. B. (1991). The social self: On being same and different at the same time. *Personality and Social Psychology Bulletin*, 17(5), 475–482. doi: 10.1177/0146167291175001
- Carroll, G. R. & Swaminathan, A. (2000). Why the microbrewery movement organizational dynamics of resource partitioning in the US brewing industry? *American Journal of Sociology*, 106(3), 715–762. doi: 10.1086/318962
- Cloutier, L.M., Renard, L., Arcand, S. & Lavolette, E.M. (2016). Rejuvenating the Cider Route in Quebec: An action design research approach to stakeholder collaboration and innovation. *Technology Innovation Management Review*, 6(11), 6–17. doi: 10.22215/timreview/1030
- Cropper, S. & Bor, S. (2018). Unbounding the meta-organization: Coevolution and compositional dynamics of a health partnership. *Administrative Sciences*, 8(42), 1–19. doi: 10.3390/admsci8030042
- Dumez, H. (2008). Les méta-organisations. *Le Libellio d'Aegis*, 4(3), 31–36.
- Dumez, H. & Jeunemaitre, A. (2010). The management of organizational boundaries: A case study. *M@n@gement*, 13(3), 151–171. doi: 10.3917/mana.133.0152
- Ehlinger, S., Perret, V. & Chabaud, D. (2007). Quelle gouvernance pour les réseaux territorialisés d'organisations? *Revue Française de Gestion*, 1(170), 155–172. doi: 10.3166/RF.170.155-171
- Eisenhardt, K. (1989). Building theories from case study research. *Academy of Management Review*, 14(4), 532–550. doi: 10.2307/258557
- Ellis, N. & Ybema, S. (2010). Marketing identities: Shifting circles of identification in interorganizational relationships. *Organization Studies*, 31(3), 279–305. doi: 10.1177/0170840609357397
- Fusch, P.I. & Ness, L. R. (2015). Are we there yet? Data saturation in qualitative research. *The Qualitative Report*, 20(9), 1408–1416. doi: 10.46743/2160-3715/2015.2281
- Frandsen, F. & Johansen, W. (2013). Public relations and the new institutionalism: In search of a theoretical framework. *Public Relations Inquiry*, 2(2), 205–221. doi: 10.1177/2046147X13485353
- Gadille, M., Tremblay, D. G. & Vion, A. (2013). La méta-organisation territoriale, moteur d'apprentissages collectifs. *Revue Interventions Economiques: Papers in Political Economy*, 48, 1–12. doi: 10.4000/interventionseconomiques.2156
- Gioia, D. A., Corley, K. G. & Hamilton, A. L. (2013). Seeking qualitative rigor in inductive research: Notes on the Gioia methodology. *Organizational Research Methods*, 16(1), 15–31. doi: 10.1177/1094428112452151
- Hallstrom, K. T. & Bostrom, M. (2010). *Transnational multistakeholder standardization: Organizing fragile non state authority*. Edward Elgar Publishing. doi: 10.4337/9781781000625
- Karlberg, E. & Jacobson, K. (2015). A Meta-organizational perspective on the Europeanization of civil society: The case of the Swedish Women's Lobby. *Voluntas: International Journal of Voluntary and Nonprofit Organizations*, 26(4), 1438–1459. doi: 10.1007/s11266-014-9463-0
- Langley, A. (1999). Strategies for theorizing from process data. *Academy of Management Review*, 24(4), 691–710. doi: 10.2307/259349
- Laurent, A., Garaudel, P., Schmidt, G. & Eynaud, P. (2019). Civil society meta-organizations and legitimating processes: The case of the addiction field in France. *VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations*, 31(1), 19–38. doi: 10.1007/s11266-019-00094-8
- LégisQuébec. (2021a). Chapter S-13 - Act respecting the Société des alcools du Québec. Retrieved from: www.legisquebec.gouv.qc.ca/en/document/cs/S-13
- LégisQuébec. (2021b). S-13, r. 4 - Regulation respecting cider and other apple-based alcoholic beverages. Retrieved from: www.legisquebec.gouv.qc.ca/en/document/cr/S-13,%20r:%204
- LégisQuébec. (2021c). A-20.03 - Act respecting reserved designations and added-value claims. Retrieved from: www.legisquebec.gouv.qc.ca/en/document/cs/A-20.03
- Meyer, M., Buber, R. & Aghamanoukjan, A. (2013). In search of legitimacy: Managerialism and legitimation in civil society organizations. *VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations*, 24, 167–193. doi: 10.1007/s11266-012-9306-9
- Pallas, C., Gethings, D. & Harris, M. (2015). Do the right thing: The impact of INGO legitimacy standards on stakeholder input? *VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations*, 26, 1261–1287. doi: 10.1007/s11266-014-9475-9
- Patvardhan, S. D., Gioia, D. A. & Hamilton, A. L. (2015). Weathering a meta-level identity crisis: Forging a coherent collective identity for an emerging field. *Academy of Management Journal*, 58(2), 405–435. doi: 10.5465/amj.2012.1049

- Pentland, B.T. (1999). Building process theory with narrative: From description to explanation. *Academy of Management Review*, 24(4), 711–724. doi: 10.5465/amr.1999.2553249
- Pfeffer, J. & Salancik, G. (1978). *The external control of organizations: A resource dependence perspective*. Harper & Row. doi: 10.2307/2231527
- Rajwani, T., Lawton, T. & Phillips, N. (2015). The 'voice of industry': Why management researchers should pay more attention to trade associations. *Strategic Organization*, 13(3), 224–232. doi: 10.1177/1476127015590963
- Rosch, E. & Lloyd, B. L. (1978). *Cognition and categorization*. Lawrence Erlbaum Associates.
- Saldaña, J. & Omasta, M. (2016). *Qualitative research: Analyzing life*. Sage publication.
- Snihur, Y. (2016). Developing optimal distinctiveness: Organizational identity processes in new ventures engaged in business model innovation. *Entrepreneurship and Regional Development*, 28(3–4), 259–285. doi: 10.1080/08985626.2016.1155745
- Suchman, M. C. (1995). Managing legitimacy: Strategic and institutional approaches. *Academy of Management Review*, 20(3), 571–610. doi: 10.2307/258788
- Ungureanu, P., Bertolotti, F. & Mattarelli, E. (2020). Collaboration and identity formation in strategic interorganizational partnerships: An exploration of swift identity processes. *Strategic Organization*, 18(1), 171–211. doi: 10.1177/1476127019840148
- Valente, M. & Oliver, C. (2018). Meta-organization formation and sustainability in sub-Saharan Africa. *Organization Science*, 29(4), 678–701. doi: 10.1287/orsc.2017.1191
- Van de Ven, A. (2007). *Engaged scholarship: A guide for organizational and social research*. Oxford University Press. doi: 10.5465/amr.2008.34424997
- Webb, J. (2017). Keeping alive innovation through identity work and play. *International Journal of Innovation Management*, 21(5), 1–22. doi: 10.1142/S1363919617400096
- Whelan, G., de Bakker, F. G., den Hond, F. & Muthuri, J. N. (2019). Talking the walk: The deflation response to legitimacy challenges. *M@n@gement*, 22(4), 636–663. doi: 10.3917/mana.224.0636
- Whetten, D. A. & Mackey, A. (2002). A social actor's conception of organizational identity and its implications for the study of organizational reputation. *Business & Society*, 41(4), 393–414. doi: 10.1177/0007650302238775
- Wry, T., Lounsbury, M. & Glynn, M. A. (2011). Legitimizing nascent collective identities: Coordinating cultural entrepreneurship. *Organization Science*, 22(1), 449–463. doi: 10.1287/orsc.1100.0613
- Ybema, S., Vroemisse, M. & Van Marrewijk, A. (2012). Constructing identity by deconstructing differences: Building partnerships across cultural and hierarchical divides. *Scandinavian Journal of Management*, 28(1), 48–59. doi: 10.1016/j.scaman.2011.12.006
- Yin, R. K. (2017). *Case study research: Design and methods* (6th ed.). Sage Publications.
- Zhao, E. Y., Fisher, G., Lounsbury, M. & Miller, D. (2017). Optimal distinctiveness: Broadening the interface between institutional theory and strategic management. *Strategic Management Journal*, 38(1), 93–113. doi: 10.1002/smj.2589